



# Learning Principalship: Becoming a Principal in a Swedish Context

A study of Principals in Education and Practice

Stina Jerdborg



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GOTHENBURG

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## Abstract

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Novice principals are expected to acquire professional skills by participating in education. Consequently, expectations are set for principal education to support novice principals in how to take on principalship. The aim of this study is to explore novice principals' learning and their understanding of principalship in a Swedish context as the principals are socialised into their role through education and practice. The research questions are: How do principals engage in principal training in the interaction with their professional work practice? How can principals' process of learning and understanding be explained? What is the importance of principal training in relation to the creation of a coherent school leader role for a contemporary school context? The study focuses on principals in Swedish compulsory schools who participate in their third and final year in the mandatory Swedish National Principal Training Programme.

A qualitative research design elaborated from a practice perspective is adopted to explore principals' processes of learning in complex contexts. A situated perspective is applied, interviewing and observing principals in both their educational and their workplace practice. In addition, teachers are interviewed in schools. Wenger's social theory of learning constitutes the theoretical framework for the study.

Three papers address principals' processes of learning. In paper I, *Educating school leaders: Engaging in diverse orientations to leadership practice*, novice principals engagement in principal training is investigated together with how their identity forms in the interaction between their school leadership education and professional working practice. In paper II, *Participation in the Swedish National Principal Training Programme: How does it intertwine with principals' practice?*, the focus is set on how participation in the Swedish principals' programme actually intertwines

with principals' work. In paper III, *Novice school principals in education and the enactment of pedagogical leadership in practice*, novice principals' enactment of pedagogical leadership in relation to their preparation and overall professional path toward principalship is examined.

The findings show different understandings of leadership at play that effect socialisation into the role differently. Principals' orientation toward work influences their participation in the educational programme and their experience of working practice. Three approaches are depicted, each of which describes professional identity development. Processes of learning and understanding are intertwined through principals' engagement in programmes and practices, which affects school. This leads to development but also to conflicts and ruptures. Based on their programme participation, principals mirror their schools becoming external reviewers. The results show the importance of the principal moving into the schools' core business and leading 'from within'. Principals thus can take support from principal education, acting as brokers and gaining legitimacy as professional leaders.

The findings show that leadership knowledge is developed in relation to principals' previous areas of experience and expertise. However, the study makes clear that novice principals in taking the step into principalship, are often deprived of their expertise. If they cannot share their repertoire (with which to understand and develop practice), the principal cannot engage in pedagogical leadership. Likewise, not sharing a school leadership repertoire stemming from experiences of leadership practices means that principals are obstructed from learning in the programme and making connections with practice. Thus, novice principals in Sweden are at risk of becoming *all new*; that is, new in all senses of their professional lives and deprived of their ability to engage in pedagogical leadership practices.

These findings suggest that the principal programme in its current format is focused on expert principals aiming to develop professionally but excludes novice participants who are still on the journey to becoming a principal. In sum, findings show that novice principals' understandings of leadership can be closely attached to identity and neither easily nor naturally develop. Moreover, professional socialisation through education does not overcome former organisational socialisation. However, participation in the programme enables further development for participants with former experiences of their school practices and school leadership who take an organisational orientation to their role and work.

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## Chapter 1 Introduction

In the first chapter of this thesis, I will briefly introduce the research problem to present the issues that are explored in this study. The aim of the research and the associated questions are also presented.

### Introducing the Research Problem

With increasing global demand for high performing schools, the question of how principals as leaders of schools are to be educated has become a central concern and a political imperative (Forde, 2011). Research on the leadership and development of principals is closely aligned, and approaches to principals' learning are increasingly designed to account for the role, school context, and personal variables across the full span of a principal's career (Walker, 2015). While the associated research field is not as extensive as for principals and school leaders, it is used to inform programme design for school leadership education (Schleicher, 2012).

Research on so-called exemplary leadership preparation programmes and their quality features demonstrates the importance of having a well-defined theory of leadership for school improvement to frame the programme. Moreover, having a coherent curriculum that addresses instructional leadership, organisational development and change management that align with standards is also important, together with active learning strategies, integrating theory and practice, having internships interrelated to mentorship, designing social and professional support in the form of using cohorts and formalised mentoring, and using assessment practices for participants and programmes (Davis et al., 2005; Orr, 2006; Orr & Orphanos, 2011; Young & Crow, 2017; Young et al., 2009).

Definitions of these features have later become foundations for the development of constructs in research on principal preparation. However, it has proven difficult to delineate the effects of school leadership education from other possible influencing factors on principals' work. Self-assessment measures are often used in the research of effects, although relying on self-assessment has been questioned as it has been found that participants tend to respond positively to surveys and evaluations regardless of any general view concerning the quality of the education under evaluation (Darling-Hammond et al., 2007).

The transition from education to work is a less common theme, and the transfer of learning from preparatory programmes for school leadership to a professional work setting requiring a clear programme structure and other design elements to motivate participants has received little attention to date. These elements include developing leadership skills, professional ethics, leading learning for teachers, opportunities for vision work, and goal and performance management strategies (Orr & Barber, 2006; Orr & Orphanos, 2011). Moreover, Darling-Hammond and colleagues (2010) investigated pre- and in-service exemplary principal development programmes and found that any programme content in school leaders' education, no matter how appropriate, will only be powerful if well implemented and mutually reinforced with other programme elements. Regardless of either content or programme features, programme content can result in very different outcomes, depending on how it is understood by the participants. Moreover, individual differences in learning and how students transfer educational content has been demonstrated in school leadership education specifically and in a more general sense (Darling-Hammond et al., 2010; Tomlinson, 2007). Crawford and Cowie (2012) further show that principals' engagement in programmes provides a grounding in the new identity as principal while enabling access to supportive networks. However, in their study, only some new principals continued contact with these enduring networks.

There is an ongoing movement toward new forms of school leader development that values tacit and emerging knowledge as much as formal knowledge (Walker, 2015), built upon emerging understandings of how leaders learn. This includes a move toward more active and student-centred learning strategies, formal mentoring systems, and supervised internships (Darling-Hammond et al., 2010). For example, school leaders are becoming more engaged in workplace learning through internship, or university-district partnership. However, stakeholders contest the worth of such projects and highlight a lack of clarity of expectations (Barnett et al., 2009; Darling-Hammond et al., 2010; Grogan et al., 2009; Lumby et al., 2008, 2009; Perez et al., 2011; Piggot-Irvine, 2011; Walker, 2015).

Forde (2011) states that we now know a great deal about approaches to principal development. However, more knowledge is needed on how school leaders acquire professional skills in education. Moreover, the knowledge about how to prepare and develop school leaders is still limited (Davis et al., 2005; Goldring et al., 2009), and how school leadership education affects the learning and activities of principals requires exploration (Hallinger & Heck, 1998; Jacobson & Bezzina, 2008; Taylor et al., 2009). However, addressing these issues is difficult because of the complex nature of professional learning combined with the

complicated nature of the relationship between leadership development and leadership practice in schools (Caspersen et al., 2018; Forde, 2011).

In addition, accountability policies, decentralisation requirements, and demographic shifts have been found to affect the content and foci of leadership preparation programmes in many countries. This is evident in a renewed emphasis on assessment and organisational capacity building, but also in the alignment of preparation with results-driven policies of standardisation and accountability (Ylimaki & Jacobson, 2013). However, Brauckmann and colleagues (2020, p. 9) state that we cannot predict how far the enablement of stronger professional self-governance, as is intended by accountability and autonomy, is framed by destabilisation. Studies on the environmental conditions of school leadership actions still requires further investigation (Hallinger, 2018) in terms of whether, and to what extent, leadership actions are structurally or culturally determined.

Brauckmann et al. (2020) suggest that insufficient attention has been paid to the genesis of environmental conditions, such as historical, social, political, and societal contexts; conditions of system structure; and space for actions and decisions to be taken. In the transition between education and work, school principals enter a context-driven, decision-making process about whether, and how, they wish to use the acquired knowledge. Spillane and colleagues (2002) refer to this process as sensemaking or interpretation, which is also in juxtaposition to the context of their school. The process of decision-making about research findings and their relevance for a school principal's own context might be characterised by the ambiguity in relating the available universal evidence to the specific and unique contextual challenges (Donmoyer et al., 2012). Brauckmann and colleagues (2020) propose that educational programmes for principals, such as the Swedish National Principal Training Programme, should preferably be studied as they might offer some insights on this theme.

The Swedish National Principal Training Programme was made mandatory for all newly appointed principals in compulsory and upper secondary schools in Sweden in 2010 (SFS 2010:800; Skolverket, 2010). The programme runs over three years parallel to work as a principal and is currently hosted by seven universities at the request of the Swedish National Education Agency, *Skolverket*. The intention of the programme is to make principals better equipped to lead the development of schools in accordance with national steering documents. Brauckmann et al. (2020) describe how the Swedish programme emphasises a combination of theory and practice, combining context-independent generic skills with opportunities for real-life application and the experimentation of ideas within schools. Teaching and learning thus take place in traditional classes and on-site when principals are working. The programme provides traditional lectures

as well as group coaching, and thus processes both research-based and experience-based knowledge. The programme intends to engage principals in meta reflection and critical thinking within seminars and group work, as well as reflection upon specific experiences. The programme also offers opportunities for networking with peers and provides visits to other participants' schools (Brauckmann et al., 2020; Norberg, 2019).

This research investigates the interplay between principals' participation in this specific programme and their engagement in practice: i.e., the challenges they encounter in their local school organisations, the practical and pragmatic ways they use to manage dilemmas through ongoing negotiations, and what kind of dilemmas they encounter in the process of learning principalship in the Swedish context. A practice perspective is used for this study, adopting the idea that practice is fundamental to the production, reproduction, and transformation of social and organisational matters.

### Aim and Research Questions

The overall aim of this thesis is to explore novice principals' learning and their understanding of principalship in a Swedish context as principals are socialised into the role through education and practice.

The research questions are as follows:

1. How do principals engage in principal training in the interaction with their professional work practice? How can principals' process of learning and understanding be explained?
2. What is the importance of principal training in relation to the creation of a coherent school leader role for a contemporary school context?

The aim and research questions are answered through a study that focuses on principals in the Swedish compulsory schools who are participating in their third and final year in the Swedish National Principal Training Programme.

### *Outline of the Thesis*

The first chapter introduces the research problem and the overall theme of this thesis. The aim and research questions are also presented. In the second chapter, the principal in the Swedish setting is described. This is followed by Chapter 3, presenting and problematising previous research relevant for this thesis in terms of the work and role of principals, education for principals, and principals in education. In the fourth chapter, the theoretical frame and underpinnings are

introduced. This is followed by Chapter 5, focusing on the research methods of this thesis. Chapter 6 presents summarised findings of each of the three papers included in this thesis. Main findings are summarised and discussed in Chapter 7 along with highlights of the contributions in terms of knowledge, methodological, and theoretical contributions. A brief conclusion is provided in Chapter 8 together with suggestions for further research. Finally, a Swedish summary is included in the thesis.

## Chapter 2 Background

In the following section, I account for the prerequisites for principalship in the Swedish context by describing the position of the contemporary principal in terms of their qualification requirements, the educational context, and the workload. The Swedish National Principal Training Programme is also introduced.

### Setting the Scene: Principals in the Swedish Context

#### Principals, School Leaders and School Leadership

A principal is someone who either directs, leads or is the head of a school or a university. In this dissertation, several different terms are used to refer to principals. This is because I take my starting point for the dissertation from a perspective that emphasises the importance of contextual understanding. This means that terms such as principal, school leader and school leadership need to be understood in terms of both historical events and national context. The meaning (and differences in meaning) can in some cases only be understood within the specific context. By choosing one of the concepts and providing a definition would thus reduce the opportunities to understand and describe the aim of the study. I will therefore use the term that best reflects its contextual connection. This means that in the empirical part of the thesis, the term ‘principal’ is used, which refers to the person responsible for a curriculum-controlled school in Sweden at the time the dissertation was written. However, the same position has previously been named differently, framing different groups of leaders at different times. In an international context, the same work role can be named *headteacher* in a certain context and *school principal* or *principal* in another context. Education for leaders in schools is often aimed at a wider group, which means can include *school leaders* or *school management and administration* in such a context. *School leadership* can in turn include distributed leadership in schools.

According to Ullman (1997), the term *rector* [rector: translated as *principal*] can be traced back to a medieval Latin term that was used in the Catholic cathedral schools that were built in Sweden during the 13th century. Ullman concludes that the title of principal in Sweden thus derives from a time when the concept of the

title had clear references to social status and rank. The title of principal was exclusive and only applied to leaders of higher school types. In the late 19th century, the Minister of Ecclesiastical Affairs [i.e., Minister of Education] would call the school leaders regularly to Stockholm for joint deliberations as part of state governance and coordination of the education system. When summoning the leaders from the different educational institutions (*Läroverk*, *Folkskola* and *Flickskola*), the Minister would use the term *skolledare* [i.e., school leader], which functioned as a more inclusive concept than that of principal (Ullman, 1997).

Later, the title as an indicator of status was toned down and partly disappeared from Swedish society. The concept of the title has also been transformed into the name of a profession or a position (Ullman, 1997). The title of principal has also been extended to include a wider range of positions than before. From 1 July 2019 (during the time in which this research was conducted), preschool leaders have gone from being preschool directors to becoming principals through a revision in *Skollagen* [the Education Act] (SFS 2010:800). Thus, the number of principals has increased overnight. However, this is not the first time that such a transformation has taken place in Sweden. Changing the meaning of the title can be considered part of the transformation of society and the education system over time and something that continues to take place. The current school legislation states that the pedagogical work at a preschool or school unit should be led and coordinated by a principal, that a person with this employment shall be called the principal and that the name is reserved for those who have such employment (SFS 2010:800).

### The Position of Principal

Regulation of the principal position in Swedish compulsory schools is a shared responsibility between the state and the municipalities or independent school organisers. The principal's role is in some respects directly regulated by *Skollagen* [the Education Act] (SFS 2010:800) and other governing documents. Different parts of the principal's work are governed by a variety of regulations that apply to authorities, municipalities and public functions in Sweden, while for independent schools, regulations concerning companies or various forms of interest groups (depending on the ownership) are pertinent. In addition, regulations and government grants are aimed at principals in a way that indirectly affects their work to a significant degree. Moreover, several value conflicts are built into the complicated governance model of the Swedish school (cf. Jarl & Pierre, 2018; Nilsson, 2013; Ryffé, 2019).

*Skollagen* [The Education Act] (SFS 2010:800) states that the principal is responsible for the school unit and decides on internal organisation, including the

allocation of resources according to students' conditions and needs. Thus, the principal may appear to have a high degree of both freedom and responsibility. However, to be able to change the internal organisation and provide support to students according to their needs, the principal is in practice dependent on the resources and the organisation that can be offered by the municipality or independent school organiser, requiring coordination between the two. The municipality or independent organiser is also responsible for ensuring that schooling is carried out in accordance with relevant statutes.

The principal is responsible for the school unit, leading and coordinating pedagogical work. The principal also has special responsibility for the development of educational provision that is based on scientific knowledge and proven experience. The principal may also appoint another colleague to perform individual leadership tasks for which they have the required competence in accordance with the law. Conversely, the principal can never delegate entire responsibility to another (SFS 2010:800). The compulsory school curriculum states that the principal (as the pedagogical leader and head of teachers and other staff in the school) has overall responsibility for activities being focused on national educational goals; thus, they are also responsible for school results (Skolverket, 2016a).

A principal can be responsible for several school units (Skolverket, 2016b). What constitutes a school unit within the meaning of the law arose as a question when the wording in *Skollagen* [the Education Act] (SFS 2010:800) was changed in 2010 to 'a school unit may only have one principal'. A large school can be divided into several units, each with its own principal, who have full responsibility for their unit. Those who no longer have direct responsibility for students and their education, can then no longer be called a principal. The redefinition of 'school unit' has affected principals and their work by either dividing or merging units. According to *Skollagen* [the Education Act] (SFS 2010:800), a school unit is organised for a school type other than preschool, and includes activities in one or more school buildings that are close to each other. For several buildings to be considered part of the same school unit, the buildings must be reasonably close to each other and belong together naturally. A school unit also includes school-age Educare that are arranged at the school. All school units must have a principal who leads and coordinates the pedagogical work (SFS 2010:800).

### Qualification Requirements

In Sweden, the appointment of principals is made by the municipalities and the boards of independent schools, although the assignment is formally regulated by

national governing documents. Having ‘pedagogical insight through education and experience’ are formal employment requirements for principals in Sweden that must be met at the time of employment. The requirement for education and experience is not alternative, but both requirements must be met (Prop. 1989/90: 41).

Educational insight is gained through a pedagogical education at university level. Such education does not have to lead to a pedagogical profession such as a teacher, but must include pedagogical training elements. Neither the extent of pedagogy required to achieve the necessary condition nor that a certain formal education qualifies is stated. Instead, the school inspectorate assesses each case on its merits. However, the Swedish National Agency for Education, *Skolverket*, recommends that principals without the right background should study 30 credits in pedagogy at the university to meet the requirement. The Swedish Schools Inspectorate, *Skolinspektionen*, has accepted applications within a range of 22.5-30 credits, which equates to approximately one semester of full-time studies. The qualification for experience is not explicitly stated but has been tried by the inspectorate, as well as by the labour court. Based on the outcome, it can be concluded that several years of experience are required. However, experience does not necessarily need to be obtained from the school system but can be obtained from other areas of society (Skolinspektionen, 2014a).

Consequently, there is no requirement for education or experience to be focused on the activities that are central to the role, such as school type or year courses. Thus, the principal’s work is not regulated in terms of required competencies for the activities for which the principal is responsible. Accordingly, the underlying idea of provision is to give the municipalities and independent school boards freedom to design their management organisation, and for the recruitment of principals to be open to candidates who are neither teachers nor have practical experience of teaching (Skolinspektionen, 2014a; Skolverket, 2021). This contrasts with qualification requirements for teachers in Sweden whose exam specifies for which school type, year courses, and subjects they are authorised to teach (SFS 2011:326). Only those licensed as a teacher or preschool teacher and are qualified for certain teaching areas may take up a teaching role, and is responsible for the teaching they conduct (SFS 2011:189).

## Principal Statistics

The majority of Sweden’s principals are found in compulsory school; more precisely, the equivalent of 3,600 full-time positions. In compulsory school, the majority of the principals (just over two thirds) are women and just under a third

are men. Principals in compulsory school are responsible for an average of 27 teachers (Skolverket, 2021). However, school numbers vary greatly and in general, municipal principals are responsible for more school units, teachers and students than principals at independent schools. The principal with the largest areas of responsibility is responsible for nine school units and 120 teachers (Skolverket, 2016b). In the academic year 2019/2020, 80% of principals in compulsory schools were working in a municipal school and 20% were working in an independent school (Skolverket, 2020b).

Approximately 85% of principals in compulsory schools have a pedagogical university degree. The proportion with a qualification for teaching is approximately 78%. Only around 6% of primary school principals have teaching within their service and conduct classroom teaching, a proportion that has been stable for some time. Of the serving principals in the academic year 2014/2015, nine out of ten were active as teachers in the school system for at least one year, and half of them for at least 10 years (Skolverket, 2016b). The Swedish National Agency for Education, *Skolverket* (2016b), state that it is not possible to say with any certainty whether principals who do not have a teacher education meet the principal requirement for pedagogical insight through education.

For the academic year 2014/2015, *Skolverket* (2016b) states that of those principals in the Principals’ programme, 30% who started commenced their role in 2010 or later had completed the programme with approved results. For the same time among principals who worked five years in their role, 60% had completed the programme with approved results.

Approximately 90% of principals who served in compulsory school during the academic year 2014/2015 had worked as a principal for at least one year. Half had served as principals for at least five years. Of the compulsory school principals who were not completely new to the profession, 75% remained as principal at the same school unit as the year before, while 25% changed school unit. This figure has remained stable for several years. However, principals at independent schools, tend to remain at the same school unit as in the previous school year (Skolverket, 2016b). *Skolverket* (2016b) state this is because public schools are often reorganised between school years, while independent schools have more stable organisation.

In total, 70% of principals who served in compulsory schools in the academic year 2014/2015 remained as principals in the same school the following academic year; however, after three years, just under 40% remained in the same school and after five academic years, only 20% remained in the same school. For the same group of principals, 20% had left the principal profession after one year, 42% had left after three years, and 57% had left after five years (Skolverket, 2020b).

These statistics suggest a tendency among younger principals to change schools more frequently than their older peers. However, the variation among schools is large; some schools experience many changes while some keep their principal for a long time (Thelin, 2020).

### The Swedish National Principal Training Programme

The Swedish National Principal Training Programme is a state-regulated executive education for professional principals in preschools, schools and school-age Educare, as well as for staff with a corresponding leadership function in curriculum-controlled activities. The principal's programme thus forms part of the state's steering of preschool and school activity. The purpose of in-service training is to provide principals with knowledge of the requirements set out in regulations that apply within schools, preschools and school-age Educare, and to develop their role as leaders to ensure the quality of school activities (SFS 2011:189; Skolverket 2019). The training programme has been mandatory for all newly appointed principals in Sweden since the 15th of March 2010 (SFS 2010:800; Skolverket 2010). This is because principals need a stable and equal educational background to function well as a leader for the school's pedagogical activities. According to the Government's bill (Prop. 2009/10:27), principals must have the knowledge necessary to create conditions for goal fulfilment and to be responsible for developing education. The qualification requirements for admission to the programme are to be employed as a principal. Thus, the programme does not replace the requirements for pedagogical insight through education, as these must be met at appointment.

The Government's bill (Prop. 2009/10:27) states that education shall be a qualified education, where parts should be at an advanced level to satisfy a strengthened principal role. The education corresponds to 30 higher education credits—equivalent to one semester of full-time studies—and consists of three courses: school law and the exercise of authority; goal and result management; and school leadership. These have been specified in intermediate achievement goals of knowledge, understanding, skills, and abilities (Ds 2007:34; Prop. 2009/10:27; Skolverket, 2015) of which the course 'Goal and result management' has recently been adjusted and renamed to 'Governance, organisation and quality', while the course 'School leadership' has been renamed to 'School leadership—pedagogical leading' (Skolverket, 2020a). The second-cycle courses correspond to the first step toward a master's degree in educational leadership. However, principal education is regulated by a separate supplementary decree (SFS 2011:183; SFS 2019:562) which states that the qualification requirements for advanced level are exempt.

In practice, this means an obligation for principals to study an education that is given at a higher level than is met by their previous education.

The programme is currently hosted by seven universities at the request of the Swedish National Education Agency, *Skolverket*. Every six years, new national objectives are presented. Universities then apply to run the programme by presenting how they interpret the content, the objectives, and how they intend to transfer them into teaching and learning (Brauckmann et al., 2020). A new call for the programme, with minor revisions, was presented during 2020. A tender document (i.e., state authorised outline of course provision) for the programme was established in which *Skolverket* dictates the objectives according to national legislation. The tender document states that the participants are to receive qualifications for taking responsibility for students' equal, judicial, and secure education; creating prerequisites for goal achievement at individual and school levels; and taking responsibility for the development of the school (Skolverket, 2015, 2020a).

The tender document (Skolverket, 2015, 2020a) ensures that the programme fills a prominent role for the principals' future ability to lead and that it will contribute to the development of each principal's school. The programme is supposed to contribute to the development of the individual principal by them learning how to critically review and reflect on the activities and their role, thus fostering principals' abilities, such as follow-up and evaluation of their own and their schools' activities, how to analyse teaching and outcomes, how to handle schools as learning organisations, and understanding their role as both manager and leader (SFS 2011: 183; Skolverket, 2015, 2020a). After completing the course, principals should have a sound ability to lead change and development processes in schools according to the tender document (Skolverket, 2015, 2020a).

The programme runs over three years parallel to work as a principal. The participants are expected to use 20% of their working time on studies and are required to finish the three-year programme within four years in their first principal position. The training is carried out in two-to-three-day meetings twice each semester in conference hotels. Some universities offer one-day meetings at the campus in between. Educational content entails lectures, seminars, work in groups and individual assignments. Some assignments are prepared or carried out in principals' professional practice in school settings. Each participant needs to prepare and conclude each course meeting with readings, reflections and tasks. Participants are also required to gather data and analyse findings from their schools as well as using conceptual models and research in their work, generating strategies for school improvement for the specific school. Group coaching for managing dilemmas is carried out within coursework. Moreover, visits to other participants

schools are included in the programme. Engaging principals in critical reflection is an important part of education (Aas & Törnsén, 2016; Brauckmann et al., 2020; Norberg, 2019).

## Chapter 3 Previous Research

The review presented in this chapter first reports on previous research on principals with a focus on their role, work, and its development over time. The perspective I apply considers principals' work as social practice—i.e., doing—in a historical and social context that gives structure and meaning to what people do (Nicolini, 2013). Accordingly, my approach reflects both the international and the specifically Swedish contexts as well as both past and present. This approach is also applied to previous research on education for principals. As this study focuses on principals in compulsory school, it could be argued that the focus should start in 1962 when the compulsory school was introduced in Sweden (cf. Ryffé, 2019; SFS 1962:319). However, principalship in Sweden develops in interaction with societal and educational changes over time. Consequently, I provide a historical frame and briefly describe some important historical course of events that help to understand the formation of principalship in Sweden today.

### Framing the Research Area

Research on school leadership and leadership education are closely aligned, and approaches to leadership learning in education are also increasingly designed to account for both the role and school context (Walker, 2015). This means that when societal expectations of the school leaders' role changes, the direction for leadership development also changes. Thus, previous research on the principal's role, work and training has many facets. In the Swedish setting, the new tender document for the Swedish National Principal Training Programme emphasises that:

The principal's programme as a whole must shed light on strategic and active leadership that is knowledge-based. Central is to highlight the changes in the world around us as well as to be able to place the role of preschool and school in an international and historical context. (Skolverket, 2020a, p. 7 [my translation])

By placing the principal and their education in an international, Swedish, historical and contemporary context, I intend to frame the research area and create an understanding of the final part of the research review. Finally in this chapter, I report on research on principals in education, focusing on what education means

for those who participate. In this section, I go into more detail and explain what specific studies show, highlighting the need for further research.

Throughout this section, I use several terms interchangeably, such as school leader, principal and headteacher; similarly, I take the same approach for education and training. Because these terms can imply somewhat different aspects in different settings while still being largely interchangeable, they will mainly follow the research described, taking the same approach as described in the introductory section.

### Literature Search and Thematisation

For research on principal education, several overviews in the form of books, handbooks and chapters in handbooks have been very helpful in gaining a general focus on the field. Eric and Scopus databases were used for international research on education for principals and principals in education. In addition, searches eventually resulted in identifying relevant articles and book chapters via reference lists that were used for snowball searching. Thus, by searching international journals and participating in research networks, new literature could be included. The search also included research reports and government documents. In this research presentation, research was delimited to obtain a detailed and focused search within a broad scope framing the need for further research.

Swedish research on education for principals is rather limited. There are, however, two main branches: one covering the historical emergence of principal education and another that focuses on Swedish principal education today, relating it to an international context. The first branch is intertwined with studies on the emergence of the education system, professional groups in relation to the education system, and studies of the way principals' assignments have changed over time. Here, delimitations have been made with research questions in mind and in line with the study's theoretical perspective. Thus, it is possible to highlight important historical, social and cultural contexts relating to the Swedish school and its leaders that still resonate with principals' work and context. The latter branch can be said to follow international research over time from studying the programme's design and content toward studying participants within education. Consequently, I cover the main findings from available Swedish research on this theme and to relate these findings to relevant research from the international field.

International research on principals in education should be related to its context. Here, a range of studies have been included to cover findings that frame participants' processes of learning, understanding and acting in connection with programme participation and work in school practice. A special focus has been

given to programmes and contexts that share similar conditions or influences, for example the Norwegian programme.

Principals' roles and work is an extensive research area for which delimitations have been made. The research problem of this study concerns how new principals are socialised through education and work and how they approach and understand the education they must undergo in interaction with their work, which takes place in a socio-historical context (based on the study's theoretical starting point). Delimitations have been made to important work areas of principals, areas for which principal education has been proposed to be the solution.

### The Role and Work of the Principal

There is a significant and extensive body of international literature within the field of school leadership. Research on school leadership has in general been anchored in other leadership research and has thus evolved from a focus on personal qualities to issues such as: the behaviour and approaches of successful leaders, appreciation of the significance of the context in shaping leadership, and a focus on the link between leadership and the transformation of the [school] organisation (Forde, 2011). Over time, a variety of orientations have come to characterise this field of research, while being dominated by theorising on principals' work; for example, their knowledge, values, characteristics and the tools required for being an effective principal (Blossing & Ertesvåg, 2011; Jensen, 2016; Leithwood et al., 1996; Leithwood et al., 2002; Møller, 1995). Further, Aas et al. (2021) highlight 'leading school change and improvement' as an important key theme in this field, which has developed from the 1960s onwards with growth in recent decades. While there is worldwide research on this theme, Anglo-American studies dominate, including studies on the connection between instructional leadership and school development (e.g., Bossert et al., 1982), transformational leadership and school development (e.g., Leithwood, 1994), how leaders create organisational conditions (e.g., Hallinger & Heck, 2010; Leithwood et al., 2008), and how school leadership and management affect school development (e.g., Leithwood et al., 2008; Robinson et al., 2008). This research theme has generated theorisations that require further empirical examination (Aas et al., 2021).

In Sweden, interest in research on school leaders and school leadership increased during the 1980s and a new research field of educational leadership began to emerge. Scientific knowledge about principals in Sweden emerged that was closely related to principals and their professional interests. The first Swedish doctoral dissertation with the concept of 'principal' in the title came in 1981, while

in 1984 Stålhammar (1984) obtained a doctorate with a dissertation on the function of the principal in compulsory school. The same year, Hans Ekholm's (1984) study on the history of leading schools in Sweden was completed, and since then, the number of studies and dissertations that focus on principals and their work has increased.

### The Search for Successful School Leadership

Until the early 1970s, school leadership research was focused on identifying general principles for good school leadership, that could provide a standardised knowledge base for training school leaders. At the same time, school leadership began to develop as a specific profession (Griffiths et al., 1988). The impact of the leader on a school's results was formerly considered to be direct; however, later research showed that school leaders' work affects students' knowledge development, which is mediated through teachers. Further, the school leader is affected by relationships and school context (Lingard et al., 2003). Moreover, what would be termed successful school leadership has come to shift over time because the demands on school leaders have changed. From the 1980s onwards, being responsible for stability changed to being responsible for developing learning organisations and leading change processes in schools (Huber, 2010b). Since the early 1990s, school leadership research has included topics less tightly connected to related research fields (Walker, 2015), such as an emphasis on distributed leadership including teacher leadership and collaborative approaches to leadership (e.g., Crowther et al., 2009; Harris, 2012; Spillane, 2006); leadership for student learning and results (e.g., Hallinger & Heck, 2010; Robinson et al., 2008; Spillane & Seashore Louis, 2002); an emphasis on personal aspects of leadership, such as authentic leadership and commitment (e.g., Starrat, 2005); and a focus on the importance of context to successful leadership (e.g., Hallinger, 2018; Leithwood & Levin, 2008). Following a review of research on school leadership for school development between 2010 and 2020, Aas et al. (2021) found a consistent view that leadership was characterised by interaction with school professionals. Thus, they highlight leading collaborative development processes as the most important part of school leaders' work. Processes such as distributed leadership, leadership for learning, leading learning organisations, democratic leadership and leading organisational development were identified that together create common understandings of change work through meaning-making processes.

The fact that school development is dependent on the school leader is often highlighted in the research literature (Day & Leithwood, 2007; Leithwood

& Seashore Louis, 2011; Seashore Louis et al., 2010). The importance of creating learning situations for employees within the basic tasks of teaching and learning in their organisation has been demonstrated together with getting to know the prevailing school culture, evaluating teachers and promoting their professional development, fostering collaboration and agency, and using the organisation to facilitate contacts with the surrounding community (Fullan, 1993). Hallinger and Heck (1996) found that school leaders' actions can become a model for how teachers treat students, which can indirectly affect student learning. Adapting leadership to local conditions has also been shown to be important. Principals need to be clear and to openly demonstrate standpoints that are put into action by supporting teachers to work in accordance with their direction (Hameyer et al., 1995).

Leithwood and Reihl (2003, 2005) found that successful school leaders communicate the school's direction and visions and follow these up in practice. Successful school leaders are also engaged in establishing a functioning school culture, leading teacher learning and continuing to build an organisation that can support this work. In sum, studies show that successful principals lead with vision and goals. They create collaborative teamwork, they focus on both academic and social goals, they create a sense of meaning and they create a direction for the school. They actively elaborate visions for teaching and learning processes and make that part of the teaching culture (e.g., Day et al., 2008; Day & Leithwood, 2007; Seashore Louis et al., 2010). Moos and colleagues (2011a) highlight the importance of the principals' values and ethos as well as their contribution to capacity building for teaching and learning as well as the importance of being flexible to be able to lead. In research on the type of school leadership that has the greatest impact, instructional leadership is found to be more effective for student learning than leadership committed to developing teachers (Robinson et al., 2007; Robinson et al., 2008).

The problem of using such generic research results to shape principal development efforts is that results are often detached from their original context; hence, it has been criticised because it does not account for specific school and student contexts. Even where context has been considered, this is often overlooked where results are applied to more generic forms of knowledge. Moreover, this type of research fails to show how schools can increase success or how leaders can develop and improve (Hallinger, 2018; Hallinger & Heck, 2010). Definitions of 'effective' or 'successful' in terms of school and leadership have also been problematised and contested as too narrow and oversimplified. Instead, it has been pointed out that the context of leadership influences the type of leadership that is expected and needed, as well as how it is perceived

(Hallinger, 2018). School leadership as a highly responsive and contextualised relational process is highlighted by Hallinger and Heck (2010), who suggest leadership and capacity building operate as mutual influence processes. Their research emphasises that school leadership for school improvement is reciprocal, contextualised, and related to the specific schools' unique improvement trajectory.

Moos and colleagues (2011a) show how the criteria for being considered a successful school leader have changed to meet political requirements while focusing on education. Thus, gaining a common understanding of policy changes and finding appropriate ways to integrate them into the school's value base are central to professional practice. The politicisation of educational policy and practice has been discussed in terms of conformity and opposition (Uny et al., 2017). Crow and Möller (2017) identify this as part of the professional dimension of a principal's identity. That school leadership is enacted within a social setting (comprised of overlapping and unstable contextual factors and influenced by cultural, political, historical, and economic factors across both societal and national settings) is thus stressed by several researchers (Cheung & Walker, 2006; Walker et al., 2007). Understanding the culture of the school and how leadership is affected (i.e., enabled or limited) by the surrounding community and colleagues has been shown to be important aspects of school leaders' work (Hallinger, 2011; Hallinger & Heck, 1996; Seashore, 2015; Zepeda, 2015). Furthermore, principals' identity over time has been linked to school culture and local conditions. Crow and Möller (2017) argued that school leaders' identities are conditioned by capacities to manage diverse dimensions of identity, and thus are neither fragmented nor stable. Further, the core of a principal's knowledge has been argued to become more and more context dependent (Hallinger, 2018).

### Leading Core Processes of Teaching and Learning

Rapp et al. (2011, p. 36) argue that today's focus on responsibility (in terms of results and follow-up of results) means that the principal must work with the school's pedagogical content issues. While studying principals work with core processes of teaching and learning, studies have shown the advantage for principals who share pedagogical content knowledge (PCK) with their teachers. Otherwise, they could not critically evaluate or contribute to other's work. Thus, they tended to focus on general issues, which in turn failed to promote students learning and obstructed teaching development (English & Steffy, 2011; Kerrins & Cushing, 2000; Leiva et al., 2016; Sinnema & Robinson, 2007; Spillane & Seashore Louis, 2002; Stein & Nelson, 2003; Timperley, 2011). In short, this means that to lead a school requires knowledge on how to lead. However,

this leadership knowledge needs to connect knowledge about pedagogical content and knowledge on how teachers learn to teach (Robinson, 2010; Stein & Nelson, 2003). This transformation of knowledge into the functioning of a school leader does not appear automatically but needs specific attention (Stein & Nelson, 2003).

In Sweden, the leader's focus on core school tasks (in terms of teaching and learning) is referred to as pedagogical leadership (Forssten Seiser, 2017; Ärlestig & Törnsén, 2014). The National Agency for Education, *Skolverket* (2005, 2007, 2011) states that the principal's pedagogical leadership is a prerequisite for the school's assignment to be fulfilled. Since the 1950s Swedish educational policy considers pedagogical leadership to be the most important part of the principals' duty (Ståhlkrantz, 2019). However, principals in Sweden tend to engage in administrative duties rather than pedagogical leadership. Moreover, they suggest that they work less time to promote students learning compared to principals in other countries (Leo, 2015; Skolverket, 2014). This means they most often do not take direct part in teaching and learning issues. Instead, teaching teams work independently and lack direct forms of support. Thus, principals describe their work as indirect (Ärlestig, 2008). This is often explained as a kind of 'invisible contract' between teachers and principals whereby teachers handle teaching issues and principals handle the administration (Berg, 1995). However, Scherp and Scherp (2007) argue that the invisible contract is long gone, because in today's schools, teachers emphasise the importance role of principals in clarifying the pedagogical orientation of the school and that principals need to have knowledge and understanding of everyday work, why things happen, why students and teachers act as they do in different situations, and to be involved in conversations with teachers about everyday work in the school. However, while the invisible contract may have disappeared for teachers, it is unclear whether this is also the case for principals, as their actions often involve indirect leadership, which seems to confirm the opposite.

Despite these concerns, the principal's responsibility for conducting pedagogical leadership that focuses on teaching and learning is continuously emphasised by the Swedish school authorities (Skolinspektionen, 2010, 2012, 2014b). Ståhlkrantz (2019) affirms that pedagogical leadership has been specified as a more direct form of leadership since 2011, when principals were explicitly expected to visit classrooms with instructive purposes. Liljenberg (2015a) shows that indirect leadership is not sufficient to fulfil schools' assignment. Principals who can apply improvement processes to practice are acknowledged to be active and supportive while contributing to driving the improvement process forward. Ärlestig (2008) showed that principals who succeed well in schools practice a more direct form of leadership with a distinct focus on teaching and learning.

Researchers found that when principals engage in indirect leadership, they may gain legitimacy, but teaching ideas and teachers' practice do not develop (Berg, 1990; Blase & Kirby, 1992). By contrast, leading 'from within' by problematising teachers' reflections and conclusions about teaching (for example, by presenting scientific foundations or changing the organisation so that teachers can have new experiences) promotes new conclusions (Ekholm et al., 2000).

Ståhlkrantz (2019) highlights various solutions to address the lack of pedagogical leadership practices, such as allocating more time within the principals' assignment or providing further education for principals. Accordingly, both the mandatory National Principal Training Programme and the former 'Principal lift' (now renamed 'Continuing education in pedagogical leadership for principals') has been staged with a special focus on developing principals' pedagogical leadership. However, Uljens et al. (2013) argue that the professionalisation of principals through education within the framing of accountability policies is at great risk of engendering a role, tasks and leadership type that conflict with teachers' professional roles in the Nordic countries.

### Leading Collaborative Organisations

Collaborative school leadership have been found to positively impact student learning through school capacity for academic improvement (e.g., Hallinger & Heck, 2010). For some time, Nordic legislation has focused on a comprehensive schooling and education for democracy, participation, and equity (Blossing et al., 2014). The traditional Nordic school leadership profile thus entails performing leadership within long-established democratic societies building upon equal and collaborative relationships between leader and staff (Aas et al., 2021; Aas & Törnsén, 2016). Møller (2002) dismissed the power of the principal over teachers and instead termed relations between principals and teachers in the Nordic countries as 'power-with'. Meanwhile, Imsen (2004) found a connection between the quality of this kind of school leadership and how teaching and learning activities were organised in schools. Her research shows that leadership needs to orient the school toward development and change and that accordingly, the principal has a major impact on school culture. In turn, Berg (2018, p. 135) highlights four ideal-typical cases of leadership in different types of organisations; the 'commander', based primarily on the formal power as head of a production-based organisation; the 'first administrator', holding a managerial position based on detailed regulations in a rule-oriented organisation; the 'strategical entrepreneur', taking the lead in a customer-oriented organisation; and the 'professional', interpreting the constituent ambiguous intentions within

a framework organisation translating these into action by supporting the employees' professional actions.

Leo (2010) argues that a contemporary principal needs legitimacy to be able to lead, while previously they would have been able to rely on legality in the form of laws and regulations. However, Nordholm (2021) states that contemporary principals view regulations as the most prominent feature of their professional capacity. Ekholm et al. (2000) conclude that principals have formerly been (for the most part) internally congruent and have supported prevailing patterns in schools, while external congruence in the form of creating a better match between their school and the state's intentions has been less prevalent. One interpretation they put forward is that principals have lacked knowledge of the connections between organisation and teaching and are not able to incorporate pedagogical considerations into decisions on school organisation. Today, principals' pedagogical responsibility has been sharpened and clarified in school law (Jarl, 2018; Löwstedt, 2015). Berg (2018) concludes that professional school leadership today appears to combine and integrate legality in the form of responsibility for results with legitimacy as a leader responsible for operations.

Liljenberg (2015b) shows how principals can lead development work together with teachers within a distributed leadership in Swedish schools. However, this has been shown to be dependent on being well-grounded in the specific local context. Blossing and colleagues (2015) state that the principal needs good insight into the school's previous improvement history, such that improvement work is planned and implemented. Björkman (2008) points out the importance of principals creating and communicating a common focus for the school. In turn, teachers need to be active and involved in joint improvement work. Höög and colleagues (2005, 2009) show that opportunities to carry out such school-improvement work are dependent upon how the principal handles leadership, structures, and school culture in their everyday work.

School culture and local conditions have also been discussed in the form of promoting professional learning communities (Spillane & Seashore Louis, 2002; Zepeda, 2015). Such communities were identified as social resources for schools through which principals could affect student achievement, distilled through the work of teachers. This was, however, dependent on having coherent pedagogical programmes over time. Together, these aspects have been discussed in terms of school capacity that principals affect in either positive or negative ways (Heffernan, 2018; Jarl et al., 2017; Newman et al., 2001; Youngs & King, 2002).

### Changed Demands Through Decentralisation and Market Orientation

It has been argued that increased public accountability has changed demands and expanded the roles of principals across nations ever since the 1988 Education Reform Act (ERA) in England. The ERA included a national curriculum framework of goals and standards, high-stakes accountability, and open enrolments based on neoliberal market approaches (Ylimaki & Jacobson, 2013). When the ERA was introduced, it was based on the idea that increased centralisation through national goals in combination with a focus on achieved results would provide cost-effective management. When other countries followed, applying market economy thinking to education, a decentralised focus was often required—as in Sweden—whereby goal management was initially a clearer target than the focus on results (which came some time later) (Andersson, 2011; Ylimaki & Jacobson, 2013).

In the late 1980s decentralisation of state governance through municipalisation was introduced in Sweden. A new *Skollag* [School Act] was passed, marking a change from a centralised system to a decentralised system in which school leaders and municipalities were expected to take responsibility for all school matters (SFS 1985:1100). Thus, requirements changed so that each municipality could decide who would be principal, while many principals of compulsory schools also became the head of the preschool (and vice versa). However, in the early 1990s, the principal's area of responsibility was established in *Skollagen* [the Education Act] (SFS 1985:1100), such that their work did not prevent them from retaining familiarity with the daily work of the school. As a result, municipalities were to appoint one principal per school unit. After a few years, this had doubled the number of principals (Rapp et al., 2011).

The early 1990s saw a new policy course, where the direction changed from a centrally controlled to a more market-oriented state, in which the public sector would become more efficient through flatter organisations and expanded opportunities for the school professionals to interpret, concretise and reformulate goals in everyday practice (SOU 1991:82). Principals were given budget responsibility; consequently, new complexity between municipal and state governance increased (Andersson, 2011). Over time, this meant that the principal's assignments expanded to areas outside their traditional professional domain in terms of leisure time activities for students, preschool, economy, and student health (Richardson, 2010; Ullman, 1997). In 1991, the right for parents to choose a school for their child was introduced and independent schools entered into an educational market (Imsen et al., 2017; Lundahl, 2002).

Through this restructuring, the role of principals changed from being an interpreter and applicator of the state framework to being actively responsible for the school's core processes and improvement work while accepting a higher degree of accountability, highlighting the leadership role heavily (Blossing et al., 2015; Brauckmann et al., 2020; Bush, 2008; Gronn & Rawlings-Sanaci, 2003; Parhiardis & Brauckmann, 2019; Svedberg, 2016). These reforms have been heavily criticised, with the emergence of leadership disengagement and the subsequent problems with principal recruitment being identified as unintended consequences of the reforms (Gronn & Rawlings-Sanaci, 2003; Leo, 2010; Skolinspektionen, 2019). Furthermore, expansion of the role and work intensification have increased interest in distributed leadership. However, little is known about the possible challenges and consequences that could emerge for leaders as a result of mixed governance, and the interplay of autonomy and accountability (Brauckmann et al., 2020). Moreover, research regarding the relationship between system reforms and school leadership actions is scarce (Parhiardis & Brauckmann, 2019).

By the end of the 1990s, Ullman (1997) had identified four distinctive ideal types that represented different interpretations of the principal's function in Sweden: 1) a state implementation agent, 2) a municipal middle manager, 3) a temporary position for teachers, and 4) an independent profession with a scientific knowledge base (Ullman, 1997, p. 237). Later, Imsen et al. (2017) noted the expansion of restructuring processes in the Nordic countries post-Millennium, which were clearly inspired by market forces: management by objectives, decentralisation and recentralisation processes, competition, and principal-agent theory, which prescribes a top-down relationship and a sharp division of powers. However, they also show that the past foundations for schooling are still present in the discourses and practices of today. This implies that a democratic leadership mandate has been embraced in parallel with neoliberal managerial competencies (Aas & Törnsén, 2016; Moos et al., 2011b; Möller, 2009; Ylimaki & Jacobson, 2013).

### Being 'New'

A concern about novice principals' transition into work has revealed a need to investigate and describe new principals' understanding of their role specifically (cf. Spillane et al., 2015). Overall, this literature has concentrated on the developmental pathway of new principals, often focusing on the demands they face, the workload and challenges they meet, and the range of pressures and expectations they face (Barnett et al., 2012; Crawford, 2012; Murphy, 2020;

Shirrell, 2016; Weindling & Dimmock, 2006). Research on novice principals has focused on their navigation of duties, on their leadership style, the strategies they apply upon entry into the profession, and their formation of professional identity (Saarukka, 2017; Spillane & Lee, 2014; Spillane & Lowenhaupt, 2019). Despite these factors, new principals have little awareness of their professional identity (Saarukka, 2017).

Besides research on novice principals, other research on being ‘new’ and learning how to practice shows that newcomers need broad access to arenas of mature practice to be able to participate in a peripheral and legitimate way, and that such participation places fewer demands on time, effort and responsibility of work than for full participants (James et al., 2022; Lave & Wenger, 1991). Groot (1965, p. 306) showed how experienced practitioners view problems differently than beginners due to their rich former experience and prior knowledge and understanding. However, they are not always able to describe their skills verbally or explicitly. Groot stated that understanding means ‘feeling at home’; in other words, one may go back and forth within a system of typical operations and traditions of thought that have been formed through experience (Groot, 1965, p. 317). These affect the whole perception of tackling assignments or problems. A beginner cannot yet do this; however, this means that learning is always affected by what you already know (cf. James et al., 2022). Consequently, solid experience of leadership is important for principals and forms the basis for further development and learning (Pont et al., 2009, p. 102).

Most new principals have formerly been socialised within an educational professional role and bring significant school-based experience to their new post (Ringel et al., 2004). However, crossing over to the principal’s office seems to bring a necessary shift in perspective, expectations and work as the newcomer assumes a multifaceted job that spans instructional, managerial and political realms (Lortie, 2009; Spillane et al., 2015; Spillane & Lowenhaupt, 2019; Weindling & Early 1987; Woodruff & Kowalski, 2010). A sense of responsibility has been shown to result in resistance toward distributed leadership within schools (Liljenberg & Andersson, 2019; Spillane et al., 2015). It was also found that a novice school principal’s work involves certain tensions, which are not only a function of individual choices but are inherent in the position itself (Spillane et al., 2015). However, novice principals experience the nature and intensity of these tensions differently depending on the specific school and its situation in the institutional sector.

Tensions inherent in the position might be explained by historical traces in a certain context. In Sweden, the title of principal has shifted from that of a scholar (with a binding connection to academia) to being linked to the function and

position of principal; that is, becoming an occupation or profession (Ekholm, 1984; Ullman, 1997), which could lead to potential sociohistorical tensions. Moreover, the role of principal has consistently meant both leading the focus of the school’s teaching and organising, administering and documenting. The balance between engaging in core business and managing school conditions and how these assignments are distributed between different roles in the school’s organisation over time often vary, as does the spirit and the politically defined framework of the time. However, Uljens and colleagues (2013) highlight a change in dominant approaches to understanding school leadership in relation to teachers. This movement is seen in all Nordic countries. From a historical and centralised tradition, there has been a shift encompassing decentralisation that has moved back toward recentralisation. For principals, this means their competencies were built on teacher education with experience as a teacher in a specific school; however, later they were expected to be trusted professionals of schools in collaboration with teachers, more recently becoming managers of effective schools. This recent managerial function focuses on managerialist goals, results and quality assurance, accentuating the principal’s accountability, possibly in conflict with teacher professionalism. Uljens et al., (2013) thus highlight a movement from the principal as teacher toward more independent and effective educational leaders through theoretical principal preparation programmes. They also picture a possible development of ‘research-based school developmental leadership’ in which the principal is framed as an interpreter, translating different knowledge practices and co-operative action between policy, research, practice and school organisers. Consequently, being ‘new’ as a principal means having to navigate between different ways of understanding the role of principal.

Before turning to research on principal education, a brief historical overview of schooling and leadership in the Swedish setting is presented.

### Traditions of Schooling and Leadership in Sweden

Early education history (from 1571) shows that principals were university educated (to master’s level) at the Lutheran University in Germany (Ullman, 1997). However, they were part of the teaching community and role was passed on to a new incumbent every four years. Leadership was divided between three positions: the commissioner, the principal and the schoolmaster. The principal was superior while the commissioner managed the finances. The schoolmaster had the greatest responsibility for teaching. As *Läroverk*<sup>1</sup> were introduced, the principals

<sup>1</sup> The term *Läroverk* refers to educational institutions in Sweden 1849-1965 corresponding to secondary and upper secondary school.

followed the tradition of being anchored within the teaching college where basic merit, and thus legitimacy, was based on academic education. However, from beginning as a circulating assignment in the college, the role of principal became a state official from 1856 with a regulated promotion procedure, fixed eligibility regulations, and a permanent lifetime appointment at lower *Läroverk* and from 1865 at higher *Läroverk*. The qualification requirements of high academic qualifications in combination with proven teaching skills remained for more than a hundred years.

The first compulsory school, *Folkskolan*<sup>2</sup>, was introduced in Sweden in 1842, in parallel with *Läroverken*, based on a demand for more general education, thus constituting an important shift in the history of education in Sweden. There were no instructions on the organisation and management function for these schools. However, leaders were not allowed to use the title principal. With time, the term ‘school leader’ was introduced (Richardson, 2010; Ullman, 1997). Ullman (1997) describes how three parallel positions gradually emerged within *Folkskolan*: municipal inspectors, state inspectors, and from the end of the 1860s, headteachers—sometimes also called first teachers. Ullman (1997) describes a mutual crisis of confidence between these three parallel leadership positions. The headteachers of *Folkskolan* were usually not academics but were seminary-trained teachers. State inspectors were established in 1861, with a national mandate to visit the schools of *Folkskola*, offering advice and instructions and providing written documentation to cathedral chapters and ministries (Richardson, 2010). The inspectors had an academic education and believed that the seminary-trained teachers of *Folkskola* did not have the competence to assess how the school’s work should be conducted, while the teachers in *Folkskolan* believed that inspectors did not know the core activities of the schools of *Folkskola* well enough to be qualified (Ullman, 1997).

Later, when a nine-year comprehensive school was introduced on a trial basis in 1949, local school leaders were needed, meaning that a headteacher from *Folkskolan* could become the leader of the comprehensive school, with the proviso that they had an academically-trained study leader by their side. Later, the title of headteacher was replaced with the title of principal and the title of study leader with that of director of studies (Ullman, 1997). During the 1940s and 1950s, the principal’s administrative function increased, and principals began to demand administrative assistance. According to Ullman (1997), this period is characterised by the dilemma of wanting to be a good principal but being forced to devote time

to administrative tasks. There was an even greater focus on administrative work during the 1960s, and principals were now mainly regarded as administrators (Ullman, 1997, p. 177). In the mid-1960s, therefore, the educational requirements for becoming a principal were lowered.

From 1940, three Swedish government investigations laid the foundation for a cohesive Swedish school system with a nine-year comprehensive school and an expanded upper secondary school that would replace the previous school system. Trials with a comprehensive school led to the 1962 decision that the diverse and parallel school forms should be replaced by *Grundskolan*<sup>3</sup>: a single, nine-year comprehensive compulsory school with the municipality as superior. The former different traditions of school leadership now had a common school form. The introduction required major organisational changes, but as the introduction took place gradually from student’s first year of school, it took several years before the parallel school system was completely abolished (Blossing, 2021; Richardson, 2010). The municipal inspectors from before had now become municipal superintendents, while the state inspectors were abolished (Ullman, 1997). However, in the 2010s, the Swedish principals were supplemented by first teachers who thus were (re) introduced into Swedish schools (Grimm, 2020).

## Summary

Examining previous research on the role and work of principals has highlighted that school leadership is dependent on the context in which principals work. The meaning of success has also been a contested issue that has changed over time. Principal’s work has been reoriented across nations by the accountability movement so that many educational decisions are transferred to schools that also must account for their results. This shift emphasises schools as self-governing organisations and consequently highlights the leader’s role. As a result, the scope of tasks assigned to principals has also broadened, with increasing demands for self-organisation and responsibility. These reforms have been heavily criticised, with the emergence of leadership disengagement as an unintended consequence. However, little yet is known about the kind of challenges and consequences that emerge from the mix of governance and interplay of autonomy and accountability, and what these mean for leaders and schools.

In Sweden, one constancy was the unresolved question of how to distribute leadership between being the pedagogical leader and managing organisational and administrative duties. Over time, the importance of principals creating and

<sup>2</sup> The term *Folkskolan* refers to educational providers of compulsory education of 7-9 years of schooling with voluntary extension of 1-2 years in Sweden from 1842, later replaced by *Grundskolan*.

<sup>3</sup> The term *Grundskolan* refers to current basic education in Sweden and is termed compulsory school throughout this thesis.

communicating a common focus for school activities has been shown, together with teachers need to take an active part in joint school improvement work (depending on how the principal handles leadership, structures and school culture in everyday work). However, this is dependent on the principal being well-grounded in the specific local context and having good insight into the school's previous improvement history. Moreover, these issues should be solved through an enhanced focus on education for principals. Accordingly, both the mandatory Swedish National Principal Training Programme and the former 'Principal lift' now renamed 'Continuing education in pedagogical leadership for principals' has been staged with a special focus on developing the principal's pedagogical leadership. However, many questions remain regarding education for principals.

## Education for Principals

The question of how principals should be educated has become a central concern together with increasing demand for high performing schools, and research on successful school leaders is used to inform programme designs for school leader education globally (Forde, 2011; Schleicher, 2012). School leadership programmes tend to develop in response to societal changes, government regulations and new curricula within their national context while being influenced by global trends (Aas et al., 2021). However, a study of preparatory school leadership training conducted in seven countries between 2012 and 2015 shows that borrowing from education policies and programme models from other countries has created conformity in school leadership education internationally (Harris et al., 2016).

The field of research on school leader education has expanded together with the introduction and development of educational programmes for principals. The research field includes preparatory school leader training as well as further development of experienced school leaders through programmes, networks, and team development (Jensen, 2016) and is characterised by different research traditions and views on what constitutes good school leader education (Møller, 2016). A major theme identified in the literature concerning school leader education is an overview of diverse educational programmes for principals (Bush, 2008; Bush & Chew, 1999; Bush & Jackson, 2002; Brundrett, 2001; Davis et al., 2005; Forde, 2011; Jensen, 2016). From this research, we have learned that formal education for school leaders is most often established as preparation for a master's degree. However, some formal education for school leaders is aimed at further professional development (Aas & Törnsén, 2016; Harris et al., 2016; Jensen, 2016). Another theme explores how programmes are changing due to societal changes and forthcoming needs (Aas et al., 2021). Jensen (2016) concludes that research

focuses on what kind of school leadership training is offered and how it has been developed, but that there is an overall lack of conceptual and critical studies on principal programmes, and that an extension of methodological and theoretical issues would be beneficial.

Walker (2015) found that school leadership development and its connection with school leadership in sum interface into three interrelated categories of learning approaches: 'the clone', 'the drone', and 'the dragon'. The clone approach is built around informing school leaders what it means to be a good leader, i.e., research-informed by successful school leaders' work. This approach involves centrally defined leader frameworks to form the basis for leadership development and education as well as competency statements. The approach provides guidelines, such as research-based typologies of leadership practices, and provides some consistency across systems. The drone approach concerns delivery and monitoring of leader development programmes across contexts, including what, how, and where (including policies built by authorities within a specific national context and a long way from practices in schools). This approach can be an efficient way to spread insights into leadership development but is also heavily criticised. The dragon approach represents professionals driving their professional learning by practice-oriented learning, mentoring, school-based research, and networking. This learning approach is responsive to local context and the real working life of leaders and is built around authentic learning experiences.

The three approaches help to identify some uncertainties around where leadership development and leadership interface. Neither development practices nor leadership practices tend to fall solely within one approach. However, a cloning approach sometimes also includes ideological, political, and value-based components (Lumby 2014; Zheng et al., 2013) and has been criticised for being leadership by design (Gronn 2002b, 2003). Conversely, principals with control of their learning may ignore important scientific and generalised knowledge by solely listening to their own experiences (e.g., Aas et al., 2016; Walker, 2015).

However, Harris and colleagues (2016) question the reasonableness of copying successful leadership programmes from other countries, as previous empirical studies have shown that the quality of school leaders' work depends on the environment in which the leader has worked (e.g., Leithwood & Jantzi, 1999). To assume that there are universal problems and universal solutions have been criticised, but it has also been acknowledged that there is merit in learning from others experiences of principal preparation and development (Moorosi & Bush, 2011). In addition, because there is variance between countries in terms of the context in which school leaders operate, the framework conditions, and areas of responsibility, this is also reflected in diverse principal programmes (Caspersen

et al., 2018). Countries have different so-called entry qualifications, which are important to keep in mind when comparing principal training.

### The Early History of Principal Education

In the United States, formal pre-service preparation for school leaders has a long history. The first courses were offered in the late nineteenth century (Ylimaki & Jacobson, 2013). Research on school leadership education has been relevant since the 1950s and has evolved in parallel with the emergence of diverse programmes for school leaders (Jensen, 2016). At this time, the United States was practically alone in providing university-based leadership programmes for school leaders. This resulted in other countries showing interest in such provision. Canada, the United Kingdom, and New Zealand introduced similar programmes a few years later (Miklos, 1983; Møller, 1995). From the 1980s, education for school leaders spread, for example to countries in Asia (Jensen, 2016). In Asia, Singapore is the pioneer country in terms of preparation for principals and constitutes a centre for leadership development (Bush, 2008; Hean & Tin, 2008). A diploma in educational administration was launched as early as 1984, replaced by a new 'Leaders in Education' course in 2001. The content focuses on personal mastery and development for principals, leadership, achieving excellence in teaching and learning, marketing and strategics and managing competitive learning school organisations (Bush & Chew, 1999; Chong et al., 2003). China has also provided training programmes for principals since the 1950s, emphasising knowledge but neglecting leadership competencies and administrative skills (Daming, 2003).

In Sweden, school leaders were inspired by university-based school leader programmes in Chicago. At the beginning of the 1930s, headteachers became compulsory in school districts as the management of the *Folkskola* needed to be developed. The headteachers of the *Folkskola* stated early on that school leadership should be regarded as a separate profession from teaching. These headteachers coordinated and tried to differentiate themselves from the teachers' collective through trade union organising, joining forces and creating their own education (in education administration) in the early 1930s (Ullman, 1997).

A Swedish school administrative inquiry in the mid-1960s considered the issue of principals' work and education. The Board of Governors (*Skolöverstyrelsen*) was asked to arrange training to increase the principals' leadership ability. The training would include personnel management and administration as well as information on work organisation, rationalisation techniques, school administration and school statutes. The inquiry proposed that experienced principals should also receive

principal training (Ullman, 1997). The Swedish state became the organiser of school leadership training for the first time in 1967, focusing on school goals, its role in society, internal work and school results. The first courses for school principals in compulsory school were offered as a two-week course, although only 150 individuals were offered a place. In 1972, the first step was taken towards an integrated training of school leaders for all forms of schooling. However, this was not given the same academic status as in the United States. At this time, the Swedish *SLA inquiry*<sup>4</sup> emphasised the importance of all school leaders being able to access education equally, contributing to a common basic view. With regard to qualification requirements, the SIA investigators stated that the principals' competence could not be defined by specific academic degrees because it would exclude skilled leaders from certain school forms and stages, such as primary school. Instead, the school leader's role was emphasised as a coordinating role. This separated the role from teacher education requirements, suggesting that other school-related professions, such as school psychologists or school curators, may be equally suitable (Ullman, 1997).

In 1976, legislation was passed for a two-year systematic training programme for all principals—Education for School Leaders—organised by the state (Ekholm, 2015). The purpose of the programme was to better equip principals to take charge of the development of schools in line with the national goals (Johansson, 2001). The programme consisted of 25 course days divided into meetings of three or four days. The principals were also required to job shadow corporate leaders in their daily work for two weeks (Myndigheten för skolutveckling, 2007). A new National Principal Training Programme was launched in 1988, for which the municipalities had responsibility for preparation courses while the state handled courses for appointed principals (Ekholm 2015; Johansson, 2001; Johansson & Svedberg, 2013). The programme was extended to 30 course days held over three years. The two weeks of shadowing corporate leaders was removed and individual supervision was introduced. Content was divided into three courses: society and its demand for schooling, the local organisation perspective, and a teaching perspective (Ekholm, 2015).

<sup>4</sup> The *SLA inquiry* was a state school investigation in Sweden 1970–1974 resulting in a new state subsidy system for compulsory school and responsibility for students even outside class time. The leadership organisation for compulsory school was supported, leadership qualifications were changed, and school leader education was proposed (Prop. 1975/76: 39).

### Qualification and Legitimacy Through Education

Brundrett and colleagues (2006) argue that the expanded role of principals in combination with a more complex society has increased the need for principals to receive preparation for their role. Moreover, in the Nordic countries, interest in preparation and development of principals has expanded (Uljen et al., 2013). Research on the experience of being new in the role underpins this notion because this research shows that novice principals are unprepared for the job (Bush, 2008). Novice principals are often found to be shocked by the demands that are placed on them when they first enter the profession. In addition, novice principals have been found to experience loneliness. This leads to them wanting to belong in their new professional identity (Kelchtermans et al., 2011; Sackney & Walker, 2006; Spillane & Lee, 2014). Consequently, leadership preparation no longer tends to be an optional activity but is a requirement of practice so that stakeholders can be satisfied that their schools are led by qualified people (Bush, 2008). Bush (2008) further states that there is a widespread belief that leadership preparation makes a difference, but that the empirical support for this belief has been slow to emerge and is both weak and indirect.

Preparatory training of school leaders is closely related to qualification criteria for the principal position. While some countries use self-selection for principal training, others use strategic planning and only provide training for selected aspirants, often highly successful teachers (Bush, 2008; Darling-Hammond et al., 2010; Mourshed et al., 2010; OECD 2011<sup>5</sup>; Schleicher, 2012). In some countries, preparatory school leader training is a prerequisite of principalship. Prospective principals undergo training and then form a 'pool' of employable people. This approach has sometimes been criticised as ineffective, as many participants are never considered for a position as principal. In other countries, there are no such requirements, although preparatory training is still recommended. Some countries have strong qualification requirements for entering preparatory education, which then functions as a discriminator to the profession. Having a basic teaching background, or further, being a particularly skilled teacher is a requirement in many countries (Pont et al., 2008).

What principals are trained for can vary because their responsibilities differ between countries. School leaders' services are governed in some countries (such as England, Ireland and Scotland) by detailed regulations, while in other countries, such as Finland, they are only described in broad terms. In many countries, the principal has some form of teaching obligation, at least as a way of gaining an understanding of the work, supporting teachers and keeping up to date with

teaching methodology. This is considered difficult if the principal is completely disconnected from classroom activity, unable to acquire new teaching experiences. In France, Ireland, Portugal and Spain, primary school principals often work with a combined teaching assignment in their service. In other countries, principals are more like administrators, while others are strategists. Whether schools are led by a single leader or whether management assignments are shared between several leaders varies greatly (Pont et al., 2009).

In the United States, there are over 500 leadership preparation programmes nationwide and requirements for certification are determined at the state level. To create some resemblance of uniformity, standards have been developed (Ylimaki & Jacobson, 2013) with the first established in 1996 by the Council of Chief State School Officers, having been further developed and reworked since. The US standards of 2015 are research-informed and are provided by the National Policy Board for Educational Administration (NPBEA, 2015). The fact that programmes for principals started early in the United States has also resulted in research development on these issues. In addition, the huge diversity of programmes and programme organisers in the United States engenders a growing interest in comparative studies. Forde (2011) notes that this research can be divided into three main approaches: one based on formalised education, one based on learning in work, and one combined, based on learning from structured experiences.

Another example is the Ontario programme in Canada, for which potential school leader candidates are required to have an undergraduate degree, five years of teaching experience, certification at school level, two specialist qualifications or a masters' degree, and completion of a Principal's Qualification Programme; i.e., a 12-hour programme with a practicum. Mentoring is available during the first two years of practice (Schleicher, 2012).

In Europe, almost 70% of countries offer some form of school leadership training, although variations in design, organisation, and scope are large. Essentially, programmes are differentiated between preservice, induction, and in-service. Some countries have all three forms, such as England and Finland. Principal education in European countries is usually voluntary, which means that only half or so of school leaders in Europe have undergone some form of school leader training (Caspersen et al., 2018; ETUCE 2012<sup>6</sup>; Möller & Schratz, 2008; Watson, 2003).

In England, a large initiative for leadership development was made by the establishment of the England National College for School Leadership (NCSL)

<sup>5</sup> Organisation for Economic Co-operation and Development

<sup>6</sup> European Trade Union Committee for Education

in 2000. The NCSL evolved in response to the expansion of leadership roles and responsibilities with local courses on an ad hoc bases together with mentoring programmes. The idea of a national college was discussed as early as the 1980s, and a diversity of preparation and development programmes were set up on trial. The NCSL was established with a national focus, offering programmes for different career stages underpinned by research and with an emphasis on practice. The NCSL reached many school leaders and became dominant in influencing school leadership development and research in England but also globally. It has been highly praised, although some criticism has been levelled at its dominance. This is because of the perceived harm to university-based educational leadership courses that have drained the academic field of educational administration and leadership while having modest demands on participants, emphasising practice at the expense of theory and research and relying on practitioners to lead the programme, encouraging a custodial view of the role of principals (Bush, 2008).

Wales, Northern Ireland and Scotland have separate arrangements from England (Bush, 2008). In Scotland, there is a national Standard for Headship, and to prepare principals, the Qualification for Headship postgraduate diploma was introduced. The two-year programme includes online learning, supported self-study and face-to-face events. The programme is predominantly workplace-based with candidates managing and leading whole-school projects and providing a portfolio of evidence containing a claim of competence. Programme providers (such as universities and local authorities in the partnership) are accredited by The General Teaching Council, for which participation became mandatory in 2005. An alternative route was introduced in 2008, with extended individual support through mentoring by experienced principals. Crawford and Cowie (2012) have studied programme participation in Scotland and found that engagement in programmes provided a grounding in the new principal identity and afforded access to supportive networks.

In France, the principal is promoted through a public competition to the position, leading to a permanent 'identity transition' from teacher to principal (Duchauffour, 2013; Savoie-Zajc et al., 2007). The national programme for school leaders of secondary schools is similar in content to that in the United States, compromising administration, budgeting, school law, management, teacher evaluation, communication, leading staff and assessment (Huber & Meuret, 2004). Fouquet (2006) states that French principals take the national course following a selection process leading to an appointment as a deputy principal. The trainees value their experiences as deputies higher than formal training sessions.

The Spanish school management approach allows school co-workers to select a principal from within who will return to the role of staff teacher at a later date.

Because the position is for a fixed time, investing in principal education and development has not been considered justified. However, from 2008, preparatory training with content similar to that of the French programme has been required for Spanish principals. In addition, several regional investments in leadership training programmes for already active principals have been established (Pont et al., 2009). Ritacco and Bolivar (2019) investigated professional identity formation of principals in Spain and found that professional identity transforms throughout the provisional and discontinuous trajectory. The somewhat complicated and simultaneous exercise of the dual and discontinuous 'teacher-headteacher-teacher' role was found to be duplicitous, as tensions were generated by an intermediate position existing between the demands of the administration and interactions with teaching colleagues. The state of being at a crossroads was found aggravated when the 'round trip' itinerary of the post was considered. In addition, Bolívar and Moreno (2006) showed that due to the provisional switch of roles, principals suffered from ambivalence. This was expressed by some in relation to the increase in management qualifications and tasks, and by others in a defence of the requirement for specific knowledge and training.

Regarding the Nordic countries, there is no such thing as a Nordic qualification or educational profile for school leaders, as both criteria for the principal position and the access to principal education differ between the countries. In this sense, Sweden is the country that stands out with a long, compulsory programme. Aas and Törnsén (2016) argue that the Norwegian and Swedish programmes cannot be considered to have a clear common Nordic profile despite their similarities. Leadership and activity characterised by democratic ideals that have long been considered to characterise the Nordic profile are not projected in either of the two countries' principal programme goals. However, an increased degree of convergence in design and organisation with international programmes and direction can be expected (Caspersen et al., 2018).

Nearly all leaders of basic schools in Denmark have a teaching licence, and many have also attended courses in leadership even if formal school leadership training is not mandatory (Uljens et al., 2013). However, leadership training providers have offered an optional diploma course in general public management and leadership for some time, not specifically directed at principals. A new version of the diploma course was launched in 2019, comprising most general management modules and a small choice of school leadership modules (Moos, 2019). Another path comprises a master's degree in educational leadership from a university (Uljens et al., 2013).

In Norway and Iceland, there are no formal education requirements for recruitment beyond pedagogical competence in terms of teaching qualifications,

experience and leadership skills (Bush, 2008; Ottesen, 2016). Until the 1990s, Norwegian universities did not offer formal preparation for school leaders, and no nationwide programme was established until 2009 (Ylimäki & Jacobson, 2013). Since the early 1970s, national and regional authorities encouraged in-service training and such efforts were later supported by broad national in-service school leadership programmes. Experience as a teacher and substantial qualification criteria were considered sufficient, while teacher unions contested the need for formal, university-based principal preparation (Uljen et al., 2013). The situation changed, teacher training was abolished as a requirement for principalship, and the unions argued for a principals' programme (Uljen et al., 2013). In 2009, a nationwide training programme for appointed principals was launched. The programme was built upon a framework with five curriculum themes: student learning, management and administration, cooperation and organisation building, development and change, and the leadership role (Aas & Törnsén, 2016; Hybertsen et al., 2014). The Norwegian Directorate for Education and Training directs the programme while universities and university colleges work in partnership with outside associations. The Norwegian programme is organised as a part-time study for three semesters. During this time, the school leaders must involve their school in their learning activities. The programme is not mandatory, and principals are required to apply to the programme (Aas & Törnsén, 2016). Newly appointed principals are given priority among applicants, compared to more experienced leaders or other leaders in schools (Caspersen et al., 2018). Since 2018, module-based further education has also been offered (Aas et al., 2021). In Iceland there is no formal requirement for leadership training, although leaders can prepare by following a graduate diploma programme in management (Bush, 2008).

Since 1999, all principals in lower and upper secondary schools in Finland have been required to hold a masters' degree, to be qualified teachers with sufficient teacher experience, to have received a national educational leadership certificate provided by the Finnish National Board of Education, or an equivalent of 25 ECTS credits in educational leadership from an in-service education centre at a university (Uljen et al., 2013). According to the Finnish policy on the recruitment of school leaders, professional qualifications in leadership and teaching are essential (Schleicher, 2012). School leaders in Finland are offered a variety of professional development programmes and support, ranging from the leadership of schools to the use of information and communications technology (ETUCE<sup>7</sup>, 2012). Finnish leadership training thus has been decentralised in

contrast to many other countries (Alava & Värri, 2005), although aspects of school development are of increasing importance from a distributed and collaborative perspective (Uljen et al., 2013).

### Academic Status or Vocational Training

When the headteachers of the Swedish *Folkskola* became principals through the school board reform of 1958, Sweden acquired 1,200 new principals overnight. The big change was that the former headteachers were now the largest proportion at approximately 76%, which completely redefined the principal corps. In connection with this reform, the Swedish Association of School Leaders demanded a qualifying vocational education for principals. Thus, various positions came to the surface regarding education for principals. In 1961, the head teachers' union submitted a letter to the National Board of Education in which they argued that a specific school leadership education with a focus on pedagogy, psychology, sociology and political science for principals should be established at the teacher training colleges. They referred to experience from the University of Chicago in the United States that had established such a programme (Ullman, 1997). However, the proposal aroused scepticism among the traditionally-oriented principals of *Läroverk* who believed that they already represented higher academic education. They emphasised that a principal should primarily be a reputable educator and that administratively oriented training should primarily be given to the principal's chancellor. Ullman (1997) describes the tension that arose between the already academically educated principals of the *Läroverk* toward the principals of the *Folkskola* who saw an opportunity to now secure academic education.

Various approaches to principal education have been in circulation in Sweden for a long time. In recent decades, the question of status (either academic or more vocational) has continued around educational provision. In 1991, reforms changed the organisation of Swedish school authorities, while in parallel, the government directed the Swedish National Agency for Education *Skolverket* to take responsibility for the education of school leaders. *Skolverket* decided to continue with an experience-based education but launched a new organisation for the programme. It became voluntary for the municipalities to decide whether their principals were to participate in the programme or not. The thirty days of study were still distributed over two-to-three years, and the courses were revised into educational goals, steering, pedagogical development, student achievement and evaluation. Participants did not receive academic credits although universities were involved in hosting the programme (Ekholm, 2015; Ullman, 1997).

<sup>7</sup> European Trade Union Committee for Education

During the 1990s, the Association of School Leaders in Sweden presented a critical reflection on the academic school leader education in the United States, where the previously research-oriented school leader education had been replaced by a professionally adapted doctoral degree in educational administration. It was suggested that Sweden could adopt a similar approach (Ullman, 1997). The Swedish Association of Local Authorities instead said that they wanted increased influence over how new principals were trained in their municipal assignments. In an amendment to *Skollagen* [the Education Act] from 1990 (SFS 1990: 1477), the requirements for school-associated degrees were changed to what prevails today: to be employed as a principal, pedagogical insight must have been gained through education and experience. A major shift was the inclusion of groups of teachers who were previously underrepresented as potential, strong recruits (for example, principals who have worked as teachers in primary school, school-age Educare and preschool). The proportion of female principals has also increased markedly and in compulsory school, women have become the majority among principals.

An additional renewal of the principal training programme was launched in 2001. Universities hosted the programme, and it was possible for participants to validate the programme for higher education credits. The programme was run as before, with thirty days learning spread over three years. The content was revised, and the programme was established to contribute to principal accountability for upholding equality, legal security, and quality within a decentralised school system. Furthermore, they were required to stimulate staff to enhance student achievement, to evaluate, and analyse teaching and learning outcomes, and to lead their school with democratic ideas and understanding, using democratic work methods (Utbildningsdepartementet, 2001). The previous versions of the Swedish programme were evaluated and it was concluded that they had functioned well and were highly appreciated, but that participation had barely any impact on the participants' schools (Johansson & Svedberg, 2016).

### Heading Toward Professionalisation

In 2008, the new National Principal Training Programme was established as mandatory training for all newly appointed principals in compulsory and upper secondary schools from 2010 onwards. The aim of this version of the programme was to give principals knowledge about government requirements and to develop their role as a leader as well as ensuring the quality of teaching and learning in schools (SFS 2011:183). With the 2010 Education Act (SFS 2010:800), the conditions concerning who could hold the title of principal in Sweden changed

again, with leaders responsible for preschool being deprived of the principal title (to be called preschool director), while the principal title reserved for those with a position in the compulsory school system or voluntary school forms (Rapp et al., 2011). The Swedish National Principal Training Programme had a second call for tenders for its design and delivery in 2014, but these were built mainly on the same framework as before (Aas & Törnsén, 2016). From 1 July 2019, preschool directors were again allowed to become principals and the programme was also made mandatory for them (SFS 2010:800; Skolverket, 2019, 2020a). In 2020, the programme had a third call for tenders and a new selection of seven universities were appointed to run the programme. Norberg (2019) concludes that education for principals in Sweden has been under constant revision. Despite this, the focus of principal training throughout has been to prepare principals for taking on leadership for school development in accordance with national goals.

The Swedish Government decided to investigate the issue of development for principals and teachers further because the OECD<sup>8</sup> (2009) had investigated aspects of Swedish principal's work and pointed to educational reforms in Sweden lacking both cohesive strategies and contextualisation. The investigators' proposal—a new set-up for professional development called 'the Profession Programme'—was adopted and the first round of preparation courses was introduced during the autumn semester of 2021. Regarding principals, the aim of the professional programme is: a) to introduce a short preparation programme at the university level as a requirement for taking on a principal position; b) to keep the national principal training programme in its current form, later adapted for participants who will have gone through the preparation programme; and c) to offer continuously recurring development efforts (SOU 2018:17). Because of the new professional focus, the new version of the tender document places greater emphasis on the professional demands and competency requirements for principals and tones down the focus on position only.

Looking ahead, the new tender document for the Swedish principal's programme (Skolverket, 2019, 2020a) emphasises that the principal has responsibility for ensuring that school results are followed up and evaluated in relation to national goals, and in dialogue and collaboration with the teachers, critically mapping and analysing activities to identify necessary areas for improvement. The principal's ability to make pedagogical issues visible and to develop teaching and learning in active dialogue with teachers on a scientific basis is increasingly emphasised for a successful school. Knowing how to follow up, evaluate and develop teaching and learning is highlighted as a necessary

<sup>8</sup> Organisation for Economic Co-operation and Development

competence for principals; likewise, for leading teachers in developing high-quality teaching processes to achieve national goals. According to the tender document, principals should also understand different assessment methods and grading systems to be able to lead and organise teachers' work to promote student learning. This means that special emphasis is placed on leadership that focuses on the quality of teaching.

## Summary

Reviewing previous research on education for principals has highlighted several key factors: the interface between leadership development and leadership practice, the influence on training is a global concern, the quality of school leaders' work seems to depend on the environment in which the leader has worked, and qualification requirements for principals varies between countries. Throughout history, different positions about the role of leader, and what education the leader should have, have competed and affected principal education. These issues are still relevant, in terms of whether the principal should be positioned first and foremost as a skilled teacher, as a manager or as a state representative, or all three. Moreover, what are the implications for principal education?

In Sweden, different positions have resulted in tensions over time and the question of how principals should be educated were driven by principals themselves, by the state, and by municipal authorities. The question of either academic or vocational approaches is not resolved. The following section goes on to discuss the contribution of principal education for participants and their schools.

## Principals in Education

Empirical studies of formalised preparatory programmes for school leaders have two main directions. One focuses on the content of programme models, and the other on pedagogical approaches (Bush & Jackson, 2002; Foskett & Lumby, 2003; Gronn, 2002a, 2002b; Harris et al., 2016; Jensen, 2016). Such studies have had an impact on how programmes are designed both in the United States, but also internationally. The Norwegian school authority, *Utdanningsdirektoratet*, initiated a research project to increase knowledge about the Norwegian principal's programme and how the education of principals should promote school development. Within this project, Aas et al. (2021) identified competence needs in the form of knowledge, skills and general competence. When these are combined with prominent forms of school leadership, democratic leadership is understood

as the core from which to take on leadership for learning. Moreover, leadership needs to be distributed and attributed to the development of a learning organisation. Thus, programmes for principals should emphasise guidance, well-structured reflective methods and group coaching.

Much research on preparation has consisted of case studies of innovative programme models and survey-based investigations of the efficacy of specific programme features with a focus on a certain programme to examine its contents, design, effects, and costs (Orr, 2009). Such studies are often closely related to evaluation and are not situated in specific theoretical perspectives. Moreover, their findings show that the innovative use of instructional strategies, cohort membership, and programme content helped to foster principals' leadership. Other studies have investigated what participants learned about leadership, their beliefs about principalship as a career, and their actual career advancement (e.g., Orr & Orphanos, 2011). Some studies have investigated the relationship between individual programme features and outcomes.

Much of the research on principal programmes rely on participants self-assessment. However, the reasonableness of this approach has been questioned, since it has been found that participants tend to respond positively to surveys and evaluations regardless of the general view concerning the education under evaluation (Darling-Hammond et al., 2007). In addition, assessing the impact of leadership development is difficult. How school leader education affects principals' work is difficult to delineate from other possible influencing factors. Moreover, purposes of leadership are wide and varied, and impact studies tend to focus on measurable outcomes such as student test scores. In addition, the educational programmes cover many different goals, making it difficult to study with any focus. A leader's impact is also mediated and indirect and thus hard to assess (Bush, 2008).

Different qualification requirements and framework factors in different countries to which the programmes are adapted also make it difficult to design comparable studies (Caspersen et al., 2018). Therefore, more is still to be learned about how school leadership education affects principals' work. The main uncertainties congregate around context and its influence on leadership development and leadership practice (e.g., Lumby, 2014; Walker, 2015). Bush (2008) argues that there still is a major need for well-grounded research on the impact of leadership and leadership development as leaders in schools are recognised to be the second most important factor influencing school and student outcomes after classroom practice (Bush, 2008; Leithwood et al., 2008). Much research also suggests that leadership development should go beyond leadership development to a focus on the school as an organisation (Frost & Durant, 2002).

## Content and Process in School Leader Education

In research on educational programmes for school leaders, attention was primarily focused on the current and future possible content of leadership programmes. Results from studies of preparatory school leadership education show that relevant content for the participants is necessary for effective leadership learning (Darling-Hammond et al., 2010; Huber & Hiltmann, 2011; Robinson et al., 2008; Timperley et al., 2007). While there is no full agreement on content internationally, learning about teaching and learning (pedagogy), collaboration with school professionals, context, educational system and self-knowledge are content components that have been identified by several researchers as necessary (e.g., Clarke & Wildy, 2011; Darling-Hammond et al., 2010; Timperley et al., 2007). Bush and Jackson (2002) studied programmes in seven countries on four continents and found that the content of school leadership programmes had many similarities, despite a range of thoughts about content and diversity of contexts. The five most common topics were a focus on instructional leadership, school law, finance, managing people and administration, which have been mentioned as an evolving international curriculum for school leadership education (Bush, 2008; Bush & Jackson, 2002).

Darling-Hammond et al. (2010) found that any content from a programme can be implemented to convey different messages of leadership. For example, practice refers to developing ways of observing teaching and learning and providing feedback to teachers and may be implemented superficially and with little understanding of the quality of teaching. It may also be used to control teachers rather than to promote teaching and learning. Consequently, they concluded that any content or programme feature can result in very different outcomes depending on how it is understood by the programme participants. Darling-Hammond and colleagues (2010) conclude that all forms of principal development require systematic pathways into preparation supported by explicit policies.

With time, attention switched from content to process in terms of how development programmes are designed and delivered, focusing on principals as adult learners and building learning on existing knowledge and beliefs that can support their purposes and existing understanding (Bush, 2008; Tusting & Barton, 2006). In 1996, Leithwood and colleagues investigated the methods and effects of principal preparation programmes in eleven universities by exploring how 136 graduates and 739 teachers experienced the programme or the quality of leadership. It was found that the programmes made an important contribution to leadership practices in schools and that the design of programmes (including constructivist, or learner-centred strategies) was very important. In line with these results, the focus was set on approaches such as student-centred learning and

action learning as well as bridging the work and learning situation in which participants would reflect on their practice. Opportunities for structured investigation, problem-based learning, and reflective activities were integral. Huber (2010a) developed a theoretical model of information and literature processing in programs through self-evaluation and feedback, working in groups and networks, self-study and programme courses, which interact with practice and experience. In sum, no specific strategy or method has been found to be comprehensive, but a wide range of methods and strategies have been shown to contribute to participants' development (Aas et al., 2021).

When it comes to the Nordic programmes (Norway and Sweden), Aas and Törnsén (2016) analysed policy documents of both programmes in terms of tender documents (i.e., state authorised outline of course provision) and argue that these programmes mainly build on the same characteristics as the Anglo-Saxon and other international programmes. Their strongest feature is content, with process being somewhat weaker. Process features are supposed to be handled by the programme providers and their university-based staff, which to some degree can explain the invisibility of process in the programme tender documents. It is clearer from analysis that the programmes are accountability oriented, where strong leaders are expected to implement national education policies and take responsibility for the school meeting national requirements and expectations. These documents do not prescribe practical implications or tactics but maintains compliance with laws and regulations rather than decision-making and local needs of schools. Skott and Törnsén (2018) emphasise that each educational provider translates the state's intentions in its design of educational provision. Moreover, when Forssten Seiser and Söderström (2021) studied process in terms of principal collaborative learning during three years in the Swedish principal programme, their findings showed that different groups within the same programme cohort developed separate strategies and group-learner identities on how to approach educational demands and therefore gained different forms of knowledge from the programme, despite being in the same design of programme process.

## Beyond Content and Process

Moving beyond the content and process of programmes, Orr and Barber (2006) found that a clear programme structure promoted participants learning and competence, based on participants' estimates. The results also show that where participants had clearer motives for participating in education, so their expectations for their upcoming career development were increased. The most motivated participants were also more likely to realise their expectations to

a greater extent. The results indicate that as well as investigating the programmes, it is important to explore how programme participants relate to content and processes in programmes as well as how they take on work.

In a detailed and nuanced nationwide study, Darling-Hammond and colleagues (2010) followed eight pre- and in-service principal development programmes that were selected for having provided strong outcomes in preparing school leaders in the United States. Triangulated methods found that well-designed programmes can support principals' development toward leadership of school improvement and instruction, for which the programme was an important contributor. Teachers working alongside these principals confirmed stronger leadership for instructional improvement and development of collaborative organisations. However, this was primarily true regarding principals who had experienced highly qualitative in-service learning in combination with programme participation. This indicates the importance of structured experiences to support programme learning.

Looking in greater detail, Orphanos and Orr (2014) surveyed graduates from the programmes studied by Darling-Hammond et al. (2010) and compared these with a national sample. They drew the same conclusion, that a strong correlation exists between qualitative internship and principals' reported learning about how to lead teaching and learning and organisational learning in their schools. Orr and Orphanos (2011) additionally studied the influence of preparation programmes in terms of what principals learn about leadership, how they perceived their leadership practices and how this influenced school improvement and learning climate within schools. They found that a strong programme in combination with qualitative internship is positively connected to learning about and practicing knowledgeable leadership. Moreover, when principals engaged in such leadership practices, they also positively influenced school improvement and learning climate in their schools. Moreover, Orr and Barber (2006) compared the influences of programme characteristics on graduates from different programmes and found that the length and quality of field-based internships had a positive influence on participants in their working life.

Several researchers explored the importance of the Norwegian National Principal Programme for principal's practice as well as a collaborative development project. Halvorsen et al. (2016) found that principals developed new conceptualisations of leadership as perspectives from the principal programme influenced experiences of practice and reflection on theory could help to develop leadership practice. However, as leadership develops by changing practice, new tensions occur concerning how to balance diverse competencies and how to approach professionals in schools (Abrahamsen et al., 2015). This needs to be followed by meaning making and dialogues with school professionals and school organisers

(Aas & Paulsen, 2019). Likewise, Aas and Vavik (2015) explore a group coaching methodology developed specifically for school leadership development, used as an approach within the Norwegian principal programme. From textual feedback from participants, they suggest that principals need both personal and contextual feedback from other leaders to develop confidence in their role and that bringing generations of school leaders together may positively effect principals' identity development. Moreover, Brandmo et al. (2021) have investigated outcomes and processes from the same group-coaching approach from the participants point of view. They found this approach promoted a clearer understanding of the principal's role and that emotional aspects are a crucial part of developing role clarity. Further, Aas and Blom (2017) investigated successful and critical aspects of the learning process of participants in a collaboration project for experienced principals in Norway and Sweden aiming to promote innovative school environments. Their findings show that new practices were promoted through structured experiences, learning in groups and personal feedback, supported by a stable theoretical foundation and structure. The interaction between elements rendered a triangular synergy; however, important key elements were identified as follows: having a challenging and supporting process leader to offer instruction and follow-up concerning the learning process on group and personal level; having a theoretical focus and structure for participants' practice-based investigations and reflections, supporting higher level professional reflection and promoting understanding; and focusing on recognised practice. These studies address issues of content, process and outcome, but also include participants in principal education, their participation in the programme and their understanding of how education promotes their practice.

Issues of participants learning in the Swedish programme follow international research. For example, Liljenberg and Wrethander (2020) explored a learning activity that aims to develop principals' ability to analyse, critically examine, formulate and implement school improvement strategies. Their findings indicate that this learning activity was challenging for most participants but gradually mediated school improvement into practice. A systematic approach, supportive tools and mandatory course components linked to the educational assignment were shown to be of importance. However, this functioned only in relation to participants understanding and meaning-making of the activity, which seemed to be based on their previous experiences and interests. Consequently, a clear structure and participants former experiences seem important to enabling learning in line with findings from programmes in an American context (cf. Darling-Hammond et al., 2010).

## Approaching Learning and Experience

Leithwood et al. (1992) showed that two dimensions of socialisation contributed to principals' abilities to provide instructional leadership: first, professional socialisation through formal preparation and early phases of professional practice; and second, organisational socialisation involving the process of becoming familiar with the specific context where leadership is practiced. The concepts of professional and organisational socialisation were further used to examine preparation and beginning principalship finding that complex environments require role-making rather than role-taking (Crow, 2006; Heck, 2003). Browne-Ferrigno (2003) shows that programme participants state lack of experience as the most hindering aspect of their school leadership learning. However, Orr et al. (2006) show that programmes vary substantially in the use of student-centred practices and internships. Fry and colleagues (2005) concluded that fieldwork could be of importance for development; however, fieldwork in connection with programmes could also be seen as a compliance activity in the form of disconnected projects where participants learned little about the complexity of practice. Fry and colleagues' results are in line with findings from New Zealand, where Piggot-Irvine (2011) studied leadership projects in a development programme for principals, finding that even if the leadership projects were appreciated and evoked engagement by participants, their worth was contested by other stakeholders and engendered little clarity in terms of expectations. Likewise, Aas et al. (2016) show that principals' learning in the Norwegian programme was obstructed because they used experiences from their leadership practice and did not include other knowledge resources while trying to develop reflective skills to understand and manage workplace complexities. Consequently, participants do not combine experiences with scientific theories, tools and perspectives solely because of a programme's content and design. Instead, Aas and colleagues (2016) conclude that discussions among programme participants often start with brainstorming possible solutions rather than analysing a situation. The researchers conclude that experiences are used as knowledge resources and that specific training is needed to bring other resources, such as programme content, into use.

Aas and Vavik's (2015) findings show that several of the participants in the Norwegian programme (who were newly appointed principals) were still thinking and acting as teachers and struggled with their transition to being a leader. Listening to other leaders and how they contextualised their problems at work was an important source of knowledge for these novices. Likewise, they increased their understanding of their role when the educational assignment included interviewing other people in their school about how they viewed them as leaders. Årlestig (2012)

analysed final examination reports from participants in the Swedish principal programme, concluding that several participants had never used research to strengthen collected data and making analysis before. This presented somewhat of a challenge when research tools and perspectives were introduced in the programme, as trainers needed to ensure that participants were aware how to use and understand phenomena related to leadership practice. The result of the study showed that some participants reported learning in relation to tools and techniques while others seemed to acquire knowledge and skills in using models and analysis of data to enhance understanding. Only some participants developed meta-reflection and a deeper knowledge affecting their view on leadership. Thus, the quality and learning differed among the participants.

A study by Perez et al. (2011) explored field-based learning by following participants through a principal preparation programme in which participants engaged collaboratively with experienced leaders in their school. The results showed that for most participants, understandings of school leadership evolved over time. To begin, they tended to see the principal as a manager and the person in charge, using unilateral and role-based authority. They talked about discrete operational tasks and viewed problems as simple. Over time, however, they came to view the principal as the leader of instructional improvements aiming to support students learning. Moreover, with time, school leadership problems were seen as nuanced and complex, for which collaboration with staff and with many interrelated aspects enabled successful completion in an organisational way. They also preferred data use in their leadership while promoting change. However, the researchers also discussed the importance of participants' prior experience for understanding theoretical coursework to enable valuable learning. Further, studies also conclude the importance of gaining experiences from practice, especially to gain leadership experience before taking on full responsibility; thus, programme participation is experienced as complementary (Gordon et al., 2016; Johnson, 2016; Thessin & Clayton, 2013).

Later, Skott and Törnsén (2018) studied participants in the Swedish programme and found that learning was dependent upon the amount and quality of professional experiences that each participant had. The researchers show how the degree of 'newness' or having leadership experience can be divided into four categories: 1) the truly new, 2) those with some previous leadership experience, 3) those with previous leadership training, and 4) the more experienced. According to this categorisation, the truly new are obstructed in their learning. Similarly, in the United States, Darling-Hammond and colleagues (2010) found the instructional background of teacher combined with leadership potential to be of such importance for the kind of leadership that emerged that they pinpointed the

selection of participants as the most important part of a programme design, proactively bringing expert teachers into leadership. They also highlighted the importance of participants having participated in well-designed and supervised internships that provided opportunities for aspiring principals to engage in leadership responsibilities for substantial periods under the tutelage of expert veterans. Darling-Hammond and colleagues (2010) found that the possibility for a principals' programme to promote leadership of instruction and school improvement was also dependent on the following three factors: first, a faculty of educators in the programme consisting of expert scholars and practitioners being knowledgeable and experienced in teaching and administration of the specific subject areas; second, the age range of students in the participants' schools; and third, having continuous professional support from expert principals.

Another strong enabling aspect that Darling-Hammond et al. (2010) illuminate is recruiting participants who reflect the specific population of teachers and students at a specific school. This is because they are already committed to their communities and are often already experienced in instructional coaching relevant to the schools. It was also important that the programme organiser and the district aligned to the same model of leadership and leadership standards and had continuous support for principals to develop accordingly while linking programme and practice closely. It was important that the studied districts did not rely on applicants coming to them already trained, but instead facilitated purposeful recruitment and supported homegrown candidates. Relating this to the Swedish situation, Aas and Törnsén (2016) consider the Swedish principal programme's disconnection from the municipal level to be problematic, arguing that as long as state control occurs directly from the principal through the principal programme skipping over the municipalities and independent school organisers, the generation of better school results is counteracted.

In Skott and Törnsén's (2018) study, it is apparent that new principals in Sweden often move between many different school contexts during their time in education. Furthermore, in their practice, they often end up in challenges that lead to professional crises. These crises can provide learning opportunities; however, they often lead to interruptions and withdrawals or exits out of the profession (cf. Hubbard et al., 2006; Skott & Törnsén, 2018). A similar finding is made by Vennebo and Aas (2020) as they explore principals' leadership learning within the framework of the Norwegian National School Leadership programme. Vennebo and Aas's findings show that tensions occur on both personal and systemic levels. If linked to daily practice, they can be used as resources for reflection and to promote enhanced knowledge, increasing confidence in trying out new leadership practices. However, Vennebo and Aas (2020) conclude that

if leadership programmes are to make a difference in practice, they need to address the issue of emerging tensions to support participants when reflecting on these issues individually and collectively, while linking to research-based knowledge to strengthen capacity for change on individual and organisational levels. Later, Vennebo and Aas (2020) suggest from their findings that principals need knowledge and consciousness about historical and systemic perspectives as tensions involve systemic contradictions from system-wide reforms. Thus, behaviours stem not only from how individuals act but also from the socio-historical context. The researchers argue that this requires analytical and reflective skills and that such training should be included in principal programmes.

### Summary

The review of research on principals in education has highlighted the interest in content and processes of programmes as important prerequisites for leadership learning. However, later, it became clear that neither content nor process by itself corresponds with what is learned. Former experiences of teaching and leading specific age ranges and types of schools provide a basic precondition for learning to take place. Connecting experiences with programme content was not undertaken automatically by participants but presupposed specific attention. Further, it was considered important to be in a cohesive environment regarding leadership and teaching approaches, whereby the link between school, district and educational programmes seemed also to be important.

In Sweden, research on principals in programmes is still limited. However, it is apparent that new principals often move between diverse contexts during their time in education. Moreover, research shows that both content and process are experienced differently by participants, leading to different learning that is seemingly dependent on the amount and quality of their individual former experiences and access to structuring processes.

## Concluding Reflections

How principals approach and engage in education and work, what they learn, how they come to understand principalship, and how these processes can be explained is yet not clear. However, as some previous research suggests, their learning needs to be understood within socio-historical, social and educational contexts. Historically, the current understanding of school leadership in each historic period has been reflected in both school leadership preparation and school leaders' development as they have evolved in parallel with one another. The lines between research on school leadership, school leadership preparation and school leaders' development are often blurred. Several researchers argue that the scope of tasks and responsibilities assigned to principals is broadened and that the demands for self-organisation are high. The need to educate principals is often presented as a solution, and confidence in what education for principals should be able to achieve remains high in many countries.

The importance of principal training for the creation of a coherent school leader role (in terms of principalship in a contemporary school) seems to be dependent on cohesive leadership and teaching approaches; that is, agreed upon and subject to collaboration. Individual understanding of the role of principal together with former experiences of school practices have been shown to affect principals' learning and practices, although it is still unclear how principal training interacting with former understanding has an effect.

Socialisation into principalship thus seems to be influenced by its contextual premises, although the ways that education and practice influence learning and understanding need further exploration. Accordingly, I am in agreement with researchers who argue that there is a major need for research on principals in education. In addition, principal education needs to be considered in relation to school practice as well as the wider landscape in which principals, their schools and principal education are located. With this study, I intend to contribute to such knowledge by exploring the learning and understanding of principalship in a Swedish context as the principals are socialised into the role through education and practice.

## Chapter 4 Theoretical Frame

In this chapter, I present the theoretical underpinnings of this study by introducing social learning theory and placing it in a wider context to account for my own understanding. I further apply some important theoretical constructs in this thesis, which are discussed in the following text.

### Theoretical Considerations

The aim of this thesis is to explore novice principals' learning and their understanding of principalship in a Swedish context as principals are socialised into the role through education and practice. This requires theoretical tools to enable the exploration of the reciprocal relationship between people and practice that occurs in practice that is not static but in motion. This requires theoretical tools that enable learning to be understood as a process with respect to principals' practice, with its multiplicity of relations within communities, schools, principal education and wider society (e.g., Lave & Wenger, 1991). Accordingly, I depart from such a view, which has consequences for how the study is designed and presented. Therefore, I begin this section by accounting for fundamental and essential theoretical foundations for the study from which further implications are discussed.

Principals and school leadership can be studied in different ways with different theoretical inputs. As the previous chapter illustrates, principal education has to a large extent been studied with a focus on educational content and quality, often without specific theoretical framing. The effects of education and key factors for success are often characterised by evaluative and instrumental approaches. More recently, studies have focused more on participants engaging in education, applying a humanistic approach with a focus on satisfaction. However, studies that also took principals' work contexts into account reveal a diversity of viewpoints among participants and a mismatch regarding what was taught, how it was perceived and how it seems to affect learning. This partly contradicts earlier results of studies on education for principals; consequently, contests the worth of assuming that educators and participants share the goals of education and its activities (e.g., Davydov & Markova, 1982; Lave & Wenger, 1991).

## Social Learning Theory

There are many learning theories that focus on cognitive learning processes, which has resulted in cognitive processes being the primary phenomenon under study. However, Lave and Wenger (1991, p. 33) developed a theory that emphasises comprehensive understanding of ‘the whole person’ rather than ‘receiving’ a body of information or knowledge about the world, i.e., in activity in and with the world within a view where the agent, activity, and the world mutually constitute each other. This does not mean a denial of cognitive processes but highlighting theories in which social practice was the primary phenomenon under study, as a phenomenon generating learning as an integral aspect of practice. Thus, both cognition and sensemaking are seen to emerge from practice (Nicolini, 2013). The theory of legitimate peripheral participation (Lave & Wenger, 1991) was based on the theory of situated learning and by their studies on learning through apprenticeship as well as other forms of learning. Thus, apprenticeship functioned as a specific case in the development of the initial theory to reveal a fundamental learning process; that is, learning that is not only inherent in apprenticeship (Nicolini, 2013). Later, Wenger (1998), Wenger et al. (2002), and Wenger-Trayner and Wenger-Trayner (2015) continued to develop this theory, referred to as Wenger’s (1998) social theory of learning or the theory of communities of practice. Lave and Wenger’s work on legitimate peripheral participation became a bridge between theories, focusing on learning in the form of cognitive processes and theories as part of social practice with the help of concepts such as situated learning and situated activity. Learning in a situated way is about being and becoming a complex and full cultural-historical participant in the world—which practically is the same as socialisation (Lave & Wenger, 1991, p. 32).

Lave and Wenger (1991) tried to find better characterisations for the concepts of situatedness and situated activity, which with time led them to move toward a new view of learning: learning as an integral and inseparable aspect of social practice. Any activity thus can be viewed as situated, and the concept of situated activity emerged into a whole theoretical perspective. By extension, this means a view of learning as not merely situated in practice but an integral part of generative social practice in the lived-in world. Thus, peripheral participation means being in the world, being able to change perspectives and locations. Through the interplay of these concepts, a learning trajectory forms and personal development takes place. This view of learning is of fundamental importance for this study. The theory of legitimate peripheral participation enables concrete relations to be explored, and deriving from interconnections through time and

across cultures, it is both to be seen as a historically, culturally concrete concept and an analytical perspective (Lave & Wenger, 1991).

## A Practice Perspective

The work on legitimate peripheral participation needs to be located within a larger perspective. Schatzki (2000) discussed ‘a practice turn’ in social theory from the end of the 1970s, influencing the social sciences in the form of central interests, generation of new ideas and legitimising formerly marginalised research interests. Nicolini (2013) attributes this turn to two factors: first, a continuation and renewal of pragmatism in North America where the strong legacy of pragmatism made practice and doing always present and central; second, in Europe, there had long been a strong denotation of practice. It was not until the twentieth century that the practical wisdom in Aristotle’s original sense was rediscovered. Eventually, the work of Marx, of phenomenology and works on language by Wittgenstein challenged the rationalist and mentalist traditions and institutionalised demotions of practice in Europe, which accordingly became the reason for the practice turn.

That our relation to the world is based upon everyday practices into which we are socialised, which precedes our mental representations of them, was rebuked by Dreyfus (1991) with reference to Heidegger (as cited in Nicolini, 2013, p. 35). Schatzki (2000) states that a practice-based ontology is based on the view that social and organisational phenomena are aspects of the field of practices. Nicolini (2013) argues that this means ‘the practice idiom’ is not merely a theoretical lens to adopt but rather an ontological choice. The practice idiom thus recognises the primacy of practice in social matters, within which practices are seen as fundamental to production, reproduction and transformation of social and organisational matters. That is, even if organisation emerges from sense-making endeavours, it is always located in ‘material and discursive activity, body, artefacts, habits, and preoccupations’ (Nicolini, 2013, p. 7) in the life of organisational members. Consequently, the acknowledgement and combination of both a realistic and an idealistic standpoint are central within practice-based theory (Cohen et al., 2007; Nicolini, 2013). It is impossible to split the two contrasting but complementary perspectives: the realistic (objective and material) view states the existence of the world, knowable as it is, and the idealistic view sees that people construe the existing world in different ways (Blossing et al., 2018).

To view learning and activities in the form of social action and meaning-making as embedded in social and material practices can be achieved from either a situated, sociocultural, or a pragmatist tradition. Knowledge is thus viewed as distributed among people and their environments, including objects, artefacts, tools, books,

and the communities of which they are part (Greeno et al., 1996). From a socio-cultural perspective, learning and development can be seen as a continuous process that occurs through participation and where the formation of identity takes place continuously. Becoming a member of a new community, taking on a new professional role and starting in education are typical starting points for such identity development that requires both new knowledge and a 'letting go' of some of your old self (Packer & Goicoechea, 2000). In a situated tradition, meaning and action are viewed as relational systems where knowing is both individual and collective (Collins et al., 2001).

Lewellyn (2008) states that practices are to be studied analytically rather than descriptively. According to Nicolini (2013), practice theories describe what people do while engaged in practice using a performative perspective; however, they go further, as practice theories try to explain organisational matters. This is to be understood as a move away from naïve empiricism, that is, not believing in getting closer to reality by observing activities. Instead, to overcome rationalist projects using theory–method packages, practice theories go much further than just describing, while trying to produce a shift in understanding by offering new perspectives. Consequently, a practice-based approach highlights the relation between practices and material conditions, seeing social structures as temporal and inherently relational. Schatzki (2000) argues that meaning and action within relational systems in this sense are aspects of the field of practice.

A theory with a socio-cultural, situated and practice-based theoretical input thus meets the requirements of the research problem addressed in this thesis. However, as Nicolini (2013) argues, the adoption of methods needs to allow the exploration of practices. However, theorising practice can be achieved in different ways, where each tradition has its own history, vocabulary and basic assumptions (Nicolini, 2013). A distinct focus of the study is principals' learning and socialisation into the profession. Thus, Wenger's (1998) social learning theory would appear to provide a suitable starting point. This social learning approach is part of a broad and coherent practice approach and provides a critical contribution to practice theory (Nicolini, 2013).

## Implications of Theory for This Study

Nicolini (2013) highlights how all practice theories view initiative, creativity, and individual performance as necessities because being adaptive to new circumstances is inherent in the performance of practice. From a practice perspective, knowledge is considered a form of mastery that is expressed by the capacity to carry out a social and material activity. However, practice is the level of social structure that

reflects shared learning. As such, practice is a level of both experience and analysis. Practice theories can therefore provide a processual view of organisational matters and foreground the central role of mundane activities. Accordingly, the focus is on practice rather than individual performances under the acceptance of what Ortner describes as 'society as a system which is powerfully constraining but still is made and unmade through human actions and interaction' (1984, p. 159).

According to Wenger's (1998) social learning theory, the analytical focus shifts from learning as an activity performed by the individual to learning as a mode of participation in the social world. This means that rather than explaining cognitive processes and conceptual structures involved in learning, the study of learning is approached as a social phenomenon. This approach has been widely popular and has been extensively used in many research fields, somewhat more sparsely regarding the study of learning in schools or universities, the professional development of teachers and other education-related contexts (e.g., Biza et al., 2014; Blossing, 2016; Gustafson, 2010; Holmqvist et al., 2018; Johannesson, 2020; Karlsson, 2004; Oppland-Cordell & Martin, 2015; Solomon, 2007). According to Lave and Wenger (1991), the organisation of schooling as an educational form builds on the notion that knowledge can be decontextualised. However, educational institutions such as schools represent social contexts and the analysis of educational learning as situated learning consequently requires a multidimensional view on knowing and learning as part of social practice. Previous studies of principals in education have yet only briefly touched upon such a perspective by relating (to a greater or lesser degree) to the concept of 'communities of practice' (e.g., Cowie & Crawford, 2009; Crawford & Cowie, 2012; Skott & Törnsén, 2018), despite research on education for principals having demonstrated the importance of learning-centred pedagogy. Consequently, using practice theory while researching principals in education is considered an important contribution to the theoretical development of this research field.

Another practice-based approach that has been used for analytical purposes in this field is Cultural-Historical Activity Theory (e.g., Jensen & Vennebo, 2016; Vennebo & Aas, 2020). In a study on specific learning activities within the Norwegian principal programme, Vennebo and Aas (2020) found socio-historical tensions. In the Marxist historical tradition that underpins both traditions (Cultural–Historical Activity Theory and Wenger's social theory of learning) theory and practice are not considered as two separate entities but both offer points of departure for exploring and understanding historical processes (Lave & Wenger, 1991), which result in particularities that also include theories. A theory thus recaptures concrete and particular relations in an analytic way that can challenge our understanding of them. Consequently, what seemed both

particular and abstract are meant to become concrete (Lave & Wenger, 1991, p. 38). However, one distinction between these two traditions is, as Wenger (1998, p. 286) argues, that they have different ontological foundations in some regards. Cultural–Historical Activity theory takes activities, or systems of activities, as their fundamental unit of analysis. Thus, even if activities can be practices (Nicolini, 2013, p. 108), there is interest in the collective level and collective motives interacting with societal levels and history. Social theory of learning take practice as the fundamental unit of analysis because according to Wenger (1998), actions do not receive their meanings from activity or systems. Consequently, activity or systems of activities cannot be analysed without considering the fundamentality of practice as the context where negotiations of meaning are enacted in context when people strive to make their living and their experience meaningful. This means there is an interest in practice being where ‘everything’ happens. However, Wenger’s understanding of the concept of practice (1998, p. 282) was influenced by Engeström; thus, there are many communalities but with their own main interests and focus.

While Cultural–Historical Activity Theory has elaborated ways of handling artefacts and change processes analytically, the critiques of Wenger’s (1998) social theory of learning suggests that the theory is better suited for describing stability, succession, and how practices remain over time, rather than explaining processes of change. In addition, it is argued that the theory only scarcely considers how artefacts and spaces sustain sociality (Nicolini, 2013). Issues of power are also seemingly absent; thus, the theory is criticised for not being ‘a grand theory’. Wenger, however, does not claim that the theory will address all issues; it offers a conceptual framework that focuses on issues of learning, meaning and identity, and if studying other aspects, he proposes that it should be combined with other theories (Farnsworth et al., 2016). Another critique concerns idealising both mutual meaning creation in practice (Caldwell, 2005) and the central concept of communities of practice, which have also been considered problematic in diverse ways (e.g., Nicolini, 2013; Roberts, 2006). In my understanding, these critiques are mostly related to other understandings of the concepts of ‘mutual meaning creation’ and ‘community’ and a wish to bring these different understandings together. Nicolini (2013) contests the possibility of doing this and instead proposes using the concepts in a strongly qualified way; in other words, as they are presented in the theory (for example, that practice is the analytical unit, not the community). It appears that Wenger (1998) is not idealising communities of practice, as he states their practice can be just about anything (good or evil). However, this is not defined by the framework. In my understanding of Wenger (1998) the question of

communities of practice—whether they occur and what their joint engagement is about—are always empirical questions.

Through Lave and Wenger’s (1991) studies on apprenticeships, the notion of communities of practice was firmly grounded in empirical data. However, the concepts Wenger (1998) later introduced into the social theory of learning have been criticised for not being firmly empirical grounded (Engeström, 2013; Kanes & Lerman, 2008) and for a lack of conceptual and analytical clarity (Caldwell 2005; Handley et al., 2006). However, Wenger claims that the theory is a conceptual framework to be used as a tool for empirical research, and rather than testing its truth, the empirical researcher will try its usefulness in specific contexts (Farnsworth et al., 2016). This means that some constructs may be found useful and others not. In my understanding, analytical clarity will be derived from empirical use of the concepts in specific contexts and thus must be defined empirically. As Lave and Wenger (1991, p. 33) conclude, abstract representations are meaningless unless they can be made specific to a situation at hand, while the formation or acquisition of an abstract principle is itself a specific event in specific circumstances—i.e., situated (p. 39).

Taken together, this implies certain consequences for this thesis. First, theory and practice offer points of departure for exploring and understanding historical processes to recapture concrete and particular relations in an analytic way that can challenge our understanding of them. This is a prerequisite for this thesis and is the motive for the presentation of previous research in the previous section. Second, the ‘practice idiom’ as an ontological choice is a foundation for the study design and the methodological issues. Third, contextualisation will run as a common thread through the text; and fourth, the theoretical foundation will be accounted for (rather than defining the constructs) because as the constructs are defined empirically they are primarily presented and discussed as results.

In the following text, I present my understanding supported by some important theoretical foundations from Wenger’s (1998) social theory of learning in relation to this study.

## Conceptualising Practice

Practice is a key concept within practice-based theories. Wenger (1998) describes practice as social doing that is located in a historical and social context that gives structure and meaning to what people do. This implies that focusing on doing is only a departure point, as described by Lynch, where the focus on doing grants entry to the world where everything is made and remade (Lynch, 1993, p. 18). Furthermore, practices need not only to be studied descriptively but to be made

sense of analytically (Llewellyn, 2008). According to Wenger (1998), becoming part of an existing practice involves learning how to act, how to speak, and also how to feel, what to expect, and what things mean. It is therefore important to consider that the practice itself creates the social relationships that arise around it and not vice versa.

Wenger (1998) concludes that this way of conceptualising practice includes what is explicitly said or represented as well as tacit assumed notions; thus, practice comprises explicit and formally learned knowledge as well as the more intangible tacit and experienced knowledge that is derived from social action. Practice thus includes language, tools, documents, images, symbols, roles, criteria, procedures, regulations, contracts, implicit relations, conventions, values and norms, institutions, perceptions, embodied understanding and shared world views. Handley and colleagues (2006) argue that in their view there is a problematic distinction between the concepts of practice and participation that lead to conceptual confusion if considering an individual's engagement within and between multiple communities. In brief, they propose that the concept of practice should be limited only to the observable activity, thus relocating meaningfulness to the participation concept. This would make the practice concept easier to operationalise, giving what they believe to be a distinctive definition. Moreover, Turner (2008) is critical of the notion of practice in its historical sense, considering it elusive. However, in my understanding of the concept of practice, it cannot be reduced to an observable activity or an individual *per se*. Following Wenger's (1998) idiom, practice is a result of collective learning over time and consequently refers to something that goes beyond the individual and present time. Practices are achieved through people who share skills and ways to take responsibility for the professional assignment. This can be explained as practitioners being held together by a community (Lave & Wenger, 1991). Schatzki (1996) discusses different notions of the concept of practice, of which practice as performing action and practice as a spatially dispersed nexus of doings and sayings are highlighted. Lave and Wenger (1991) state that learning (as a situated activity) takes place within a process referred to as legitimate peripheral participation. This means that new practitioners participate in communities alongside experienced and already-practicing practitioners, where mastering knowledge and skills requires beginners to move from being inexperienced and peripheral to becoming experienced and fully participating in the community. Nicolini (2013) argues that this very process constitutes the necessary link between a nexus of doings and sayings and the performance of more than one person at the time. This is also why the concept becomes elusive if decoupled from the coherent theory of learning through legitimate peripheral participation. However, communities of practice may be

difficult to explore as they arise from practice and are not always explicit and observable like formal groups. A formal group may become a community of practice, although it may also only consist of what Hargreaves (1998) calls 'forced collegiality' and thus does not truly function as a community of practice.

In a school or in principal education setting, the scope of engagement of participants might be too broad and diverse to be considered a single community of practice and can instead be considered 'constellations of practices' (Wenger, 1998, p. 127). That is, while belonging to the same organisation or institution, they still have various communities at the level of practice, with their own enterprises and interpretations of the overall organisation. Continuity of the constellation should be understood in terms of interactions by boundary practices, overlaps and peripheries—all of which will be further elaborated in the forthcoming text—travelling styles and discourses. These styles and discourses are exportable and importable aspects of the repertoire of a practice that can be detached from specific enterprises, travelling across boundaries to be reinterpreted and adapted through adoption processes within various practices. As they spread, they can take on a global character; however, they should be negotiated in every local enterprise in which they are to be integrated, thus taking on their own local meaning and character.

This means that two people each engaged in reasonably comparable practices in their locality can be close even where the geographical distance is great; moreover, they might be closer than two professionals of different occupations sharing the same office space. This is the very idea of gathering novice principals in education. However, such relations may either facilitate or hinder learning. A shared background might be facilitative in terms of forming communities of practice; however, a locality still can be created after sustaining enough mutual engagement where substantial differences are present. Practice is always located in time and space as it exists in specific communities through mutual engagement. However, the landscape of diverse practices is an emergent structure, reconfiguring the geography by constantly creating localities as these relations primarily are defined by learning. In this sense, the principals in this study belong to 'local' practices in their schools and 'global' practices of principal education as related levels of participation that must coexist and shape each other (Wenger, 1998, p. 131). However, even as they participate in the 'global' they cannot engage globally as engagement is locally situated. In this study, this means that engaging in principal educational practices always means engaging locally in an educational practice while bringing experiences from their schools entails a loss of content and context. Conversely, trying to learn school leadership in a generic 'global' sense compromises complexity and what is learned has no automatic relevance in their

school practice; it does, however, require negotiation and to be mediated through the community of practice of the school. To involve such complex interactions of local and global the level of practice needs focus as it entails processes of negotiation and learning together with the formation of identities and social configurations (Wenger, 1998, p. 133).

### Commenting on Community

The concept of community requires clarification in relation to the theoretical frame of this study. This is because the term is most often applied positively, referring to empathic relationships build upon mutual understandings and shared interests and thriving on solidarity. In other words, this is an idealised notion of sociality. The concept is also applied to describe a traditional community of people (*Gemeinschaft*) from pre-industrialised societies, referring to the relationships of family and friends and the bonds of shared customs. Academic studies have utilised multiple definitions, although these have most often referred to some defined geographic area or the existence of social interactions between people with a common tie (such as norms or means). The reference has almost always been applied in positive terms. Thus, the notion of community has come to function in a prescriptive way, i.e., as a term for an 'imagined community', rather than descriptively and thus discursively in terms of definition of identity (Nicolini, 2013).

Nicolini (2013) argues that coupling community and practice runs the risk that practice will lose its processual, social, temporal and conflictual character, being subsumed by the traditional notion of community. By contrast, communities of practice are social structures that do not live up to the idealised traditional and ideal notion of community. As Wenger (1998) states, happiness and harmony are not properties of a community of practice, even though they can exist in some cases. Rather conflicts and tension are present and Wenger describes how conflict and misery may sometimes be key characteristics of some practices. Shared practice shapes community while doing things together. Mutual engagement in practice shapes mutual relationships that are complex mixtures of power, dependence, expertise, novelty, alliance, competition, authority, collegiality, resistance, compliance, trust and suspicion. However, as community is easily (mis)understood according to people's prior understandings of the concept, practice is emphasised in this study rather than community, a link that will be further elaborated in this thesis. It is practice that brings practitioners together, although it can also divide them by a plurality of positions and voices (Nicolini, 2013). As an analytical construct, communities of practice (in terms of mutual

engagement in practice) constitutes a tool. The requirements for making such engagement possible is a little elusive; however, belonging, being included in what matters, sharing information and creating an atmosphere of friendship, working and gossiping intertwined are all features that require coordination and attention by community members (Wenger, 1998, p. 74). Thus, it would be possible to explore how, to what degree, and for what purpose a social configuration could be viewed as a community of practice. Characteristics can indicate that such a community has formed in terms of a substantial degree of mutual engagement, joint enterprise and shared repertoire in relation to practice (cf. Wenger, 1998, p. 125).

### Associating Practice and Community

The term communities of practice can refer to the name of Wenger's social theory of learning and as a key concept within his work (1998, 2000). Accordingly, Wenger associates practice with the formation of communities, while the term community of practice should be viewed as a unit in which each of the two concepts specify each other (1998). Thus, the community concept in this sense is not very useful without relation to a specific practice, as it is not applicable to any community *per se*. Wenger (1998) argues that practice is a social endeavour but also that practice is the source of coherence of a community. Practice thus resides in a community of people. Mutual engagement is what defines the community, together with their negotiation of a joint enterprise and the development of a shared repertoire. Later, Wenger-Trayner and Wenger-Trayner (2020) frame the concept more precisely by referring to a community of practice as an ongoing learning partnership, which over time has resulted in a shared practice and a regime of competence. In this sense a community of practice can function as a very specific and powerful structure for social learning through members' identification with a shared domain, commitment to improving a shared practice, continuity of social structure, definition of a regime of competence over time and recognition of membership and construction of identity based on this regime of competence.

As previously stated, the concept of community always comes together with the concept of practice, which implies that dropping community and using only practice in relation to communities of practice would suffice. This is because it is practice that sustains joint enterprise and mutual engagement. Practice produces sociality and sustains regimes of competence (Nicolini, 2013). This is why I place greater emphasis on practice than community in this study. However, I do not diminish community, as it is produced by practice. A common question when using this theory is: 'which community is the study about?' This question is derived

from other ways of defining community that are disconnected from practice. Hence, I emphasise the association between practice and community in this study by exploring the social learning of novice principals with analytical constructs from Wenger's (1998) social theory of learning. Thus, the question of 'which community' becomes unaligned, as social learning can come about within a broader spectrum of social learning circumstances than strictly communities of practice. That is, learning interactions including mutual engagement (but not a shared practice and regime of competence acquired over time) are referred to by Wenger-Trayner and Wenger-Trayner (2020) as social learning spaces, not communities of practice.

Wenger (1998) describes how the association of practice and community occurs as members engage in practice to deal with what they understand to be their enterprise. Thus, their practice, as it unfolds, belongs to their community in a fundamental sense. This means that prescriptions, demands or individual influence is always mediated by the community's production of its practice by negotiations. The kind of coherence that transforms mutual engagement into a community of practice requires work and constant attention. Such work creates both similarities and differences between people as they can both develop shared ways of doing things and also specialise. Each participant will find a unique place, gain a unique identity, further integrated and defined through mutual engagement in practice (but not fused). This means mutual engagement can involve complementary and overlapping contributions of competence.

Communities have experienced difficulties forming when the pace of change in organisations are accelerate; thus, managing knowledge when groups emerge and resolve rapidly may be at stake (Roberts, 2006). However, Nicolini (2013) argues that communities of practice are always social structures without unity as practitioners are constantly busy positioning themselves within the ongoing practice as their practice continuously produces a community. A joint enterprise is the result of a collective process of negotiation that reflects the complexity of mutual engagement. Thus, the joint enterprise is the community of practice's members' negotiated response to their situation and is defined by the participants in the very process of pursuing it. This enterprise creates relations of mutual accountability among the participants that become an integral part of the practice. Defining a joint enterprise is therefore a process that is going on continuously as a resource of coordination, sense-making and mutual engagement. Over time, the community of practice creates resources that enable the negotiation of meaning in terms of a shared repertoire consisting of routines, words, tools, ways of doing things, stories, gestures, symbols, genres, actions, or concepts. This repertoire combines aspects of reification and participation. The repertoire reflects the

history of mutual engagement and remain inherently ambiguous. This makes processes of coordination and communication unpredictable and in continual need of repair while also being open-ended and generative of new meanings. This is why social arrangements must put history as well as ambiguity to work (Wenger, 1998).

The consistency of this analytical framework and the interconnected analytical concepts are an important departure point for exploring novice principals' encounters with principal education and work. Do they develop shared ways of doing things, shaping a shared repertoire as they take on principalship?

### Community and Learning

For a community of practice to include learning, an interaction of experience and competence is necessary. A community of practice can be a place for the acquisition of knowledge as it gives access to competence and invites personal experiences to engage in and incorporate competence into an identity of participation. It can also be a place for the creation of knowledge and exploration of new insights. However, this requires a strong bond between communal competence with deep respect for the particularity of experience within a history of mutual engagement around a joint enterprise (Wenger, 1998, p. 214).

For this study it is necessary to highlight participants' capability to recognise professional practices and their shared repertoires. That is, they may fail to recognise practice either because as a novice they lack understanding of what is going on, or because they do not want to accept a practice in the way it turns out to be socially negotiated. Furthermore, they need to appreciate different perspectives that are dependent on them having deep understanding of practical concerns guiding other professionals' conduct. Not until then can they interact with different 'knowings' and power positions; in other words, if discursive and material practices of mutual positioning and alignment are established. Thus, practice will consist of a dissonant pattern of voices searching for points of alignment (Nicolini, 2013). More problematic than this dissonance would be silence. As practices are social, the silence of some voices would be a sign of non-engagement, or even a lack of ability, in recognising a practice and its shared repertoire. This is because to become even a peripheral member of a community of practice, some leaning along dimensions of competence should be undertaken in terms of mutuality of engagement, accountability to the enterprise and negotiability of the repertoire, combined with an experience of meaning (Wenger, 1998). Further, participants must interact with a regime of competence in which knowing is defined as what can be recognised as competent participation in the

practice. What it is to be a competent participant (or not) is established within practice in its very process and is thus not static but in motion. Thus, experience and competence may be out of alignment, although still holding the potential for learning, transforming competence and experience and changing their alignment. The competence required suggests a negotiated definition of what the community of practice is about, experienced and manifested by members engaged in practice. The dynamics shaped by their diversity of engagement is proposed to be highly relevant for the kind of learning that can come about.

### Participation and Engagement

In this study, the focus on learning as a participative endeavour is central. Wenger (1998) places learning in the context of lived experiences of participation. Participation is an active process of taking part in social communities in which we are members. Participation shapes our experience, but it also shapes communities in which we participate. Principals participating in principal education are participants for three years, a situation that does not stop between course meetings. Participation is a broader concept than engagement. Engagement is bounded, and is also a dimension of power as it enables negotiation of our enterprises and shapes contexts in which we experience identities of competence. Developing a shared practice depends on mutual engagement.

Placing practice as a level of analysis, practice entails negotiations of identities. Consequently, participation in practice includes negotiating what it means to be a person in that context. Crow and Scribner (2013) show that stories, meetings and other artefacts are important in the identity construction of school leaders. Crow and colleagues (2017) argue that Wenger (1998) does not, in their view, sufficiently emphasise how such artefacts become tools for engagement in communities of practice. However, in my understanding, this would be an empirical question that needs to be explored in specific contexts. Wenger (1998) uses the concept of 'reification' (p. 58) in a general sense when referring to the process of giving form to experience by producing objects, tools or procedures or other points of focus around which negotiations can be conducted. Such processes of reification are central to every practice and, consequently, any community of practice does produce abstractions, tools, symbols, stories, terms and concepts (Wenger, 1998, p. 59). However, products of reification are not merely made into concrete objects but are reflections of practices. Participation and reification as a fundamental duality cannot be defined independently of each other. That is why people, things, and their meanings are explored through engagement in social practice. Through the negotiation of meaning, it is the interplay of participation

and reification that makes people and things what they are in a certain context (Wenger, 1998, p. 70).

### Learning and Identity

The negotiation of meaning is an active process of producing meaning that is both dynamic and historical as it is simultaneously contextual and unique (Wenger, 1998, p. 54). As a result, negotiation constantly changes the situation to which it gives meaning and affects all participants; therefore, it generates new circumstances for further negotiations and meanings and thus produces new relations with and in the world. However, negotiations need not to take place in speech but can be achieved through action. An identity can thus be described as a constant work of negotiating the self through layering of events of participation by which experience and social interpretation are mutually informative (Wenger, 1998). Therefore, an important issue in this study concerns the formation of identity. Principals' professional identity has been of interest to researchers in recent decades as it has been found to be an important aspect of principalship (eg., Møller, 2012; Nordholm, 2021; Nordholm et al., 2020; Saarukka, 2017; Scribner & Crow, 2012; Surgue, 2005). However, Crow and colleagues (2017) conclude that there is no coherent theoretical framework for research into principals' professional identity development.

Ryan (2007) states that role and identity can be distinguished because roles are scripted; however, identities are constantly dynamic as individuals interact with various contexts. In turn, Wenger (1998) argues that defined roles, qualifications, and distribution of authority contribute to the formation of roles and that identities will be constructed accordingly. However, identities cannot be designed; furthermore, unless roles can be realised as identities in practice, they are unlikely to connect with the conduct of everyday life (Wenger, 1998, p. 244). An important and critical point of departure is that I consider identity as temporal and part of the learning trajectory. In this study, this means that participation in principal education is an experience on a learning trajectory through which identities are continuously developing. This means that identity is in practice a constant 'becoming' that is always happening. The concept of identity is thus a pivot, or axis of rotation, between the social and the individual so that each can be talked about in terms of the other (Wenger, 1998, p. 145). According to Wenger (1998, p. 149), the lived experience of identity includes five dimensions: a) negotiated experience, b) community membership, c) learning trajectory, d) a nexus of membership, and e) a relation between local and global. Crow and colleagues (2017) conclude that in the case of principals, their experiences are negotiated with

teachers, parents, students and other stakeholders, and also policymakers (at a distance). Moreover, working for the development of schools, their work is at risk of conflict, competition, concern and identity crisis.

As principals are involved in a multiplicity of practices, any practice might represent only part of their identity. The local–global interplay in terms of both local school context and a broader set of politics and policy will also influence identity (Crow et al., 2017). However, Crow and colleagues go on to argue that Wenger does not problematise the role played by the content of learning in framing how identities become understood. Moreover, Crow et al. (2017) argue that Wenger fail to recognise the history in person in terms of where identities are historical and contested in practice (cf. Holland & Lave, 2001). Wenger views history as a form of participation and reification intertwined over time that continuously converge and diverge as they are in motion: they can interact but not fuse and are not coupled in time (Wenger, 1998, p. 87). This means that they can meet again and be renegotiated. As such, individuals and collectives are connected to our histories by a dual process of remembering and forgetting, and through the artefacts produced by our histories, as well as through our experiences of participation through generations (Wenger, 1998). For this study, I understand these aspects as empirical questions which, in the next step, needs to be made sense of analytically. That is, empirical analysis of whether, and how, educational content might frame identity is required, together with a clear understanding of how history can be renegotiated.

With regard to workplace learning, Wenger (1998) describes it as a negotiation of meaning within different communities of practice in relation to the workplace. This negotiation can, at a concrete level, address the need for appropriate tools for solving common professional practical problems. The tools that may be considered appropriate in each situation will be linked to a historical meaning created by the participants. Learning takes place in connection with the social contexts and processes of which the individual is a part and identifies with. Traditions, norms, and values in the informal communities of practice of the workplace are crucial for learning opportunities, processes, and outcomes. Knowledge thus exists as a body of expertise and becomes an integral part of activities and interactions, where the community acts as a knowledge bank based on the active involvement of the participants. Over time, these are sustainable through their ability to create relevance and values for members (Wenger, 1998). From this perspective, knowledge is always a way of knowing shared with others, a set of practical methods acquired through learning, inscribed in objects, embodied, and only partially articulated in discourse (Lave & Wenger, 1991). Thus, a study of the social formation of identity through learning can address how

identity emerges as a result of such engagement. In the context of this study, this means that principals in their working practice interact with several different communities of practice—teachers, principals, and any other community in which they may be either a participant or non-participant. Engaging in these respective enterprises and making use of their respective shared repertoires depend on being included in what matters (Wenger, 1998, p. 74), being part of negotiating the ongoing enterprise and being able to make distinctions between reified standards and competent engagement (Wenger, 1998, p. 82). Communities of practice are therefore an important force to consider, as they mediate other forces and hold the key to transformation of practice (Wenger, 1998, p. 85).

Wenger (1998) argues that people belong to many communities of practice (past, and current) either as full or peripheral members, all of which contribute to identity. However, they are not merely sequences in time, even though participants' direct engagement may be sequential. In this study, various forms of participation interact, influence each other and require coordination. An identity is therefore a nexus of multi-membership, in which multiple trajectories become part of each other, whether they weaken or reinforce each other. This work of reconciliation is an active process that is inherently social but can become very private and individual, sometimes not relevant to any practice or relation. Consequently, the principals' 'working-past' and their 'working-current' is part of their evolving identity and cannot be fully separated from their process of learning and becoming. The analytical focus thus shifts from learning as an activity performed by the individual to learning as a mode of participation in a social world. As a result, the relationship between practice, opportunities of learning, and the resulting identity of the learner are brought into focus (Nicolini, 2013).

### Boundary Work and Brokering

Wenger (1998) argues that practice creates boundaries. However, communities of practice also develop ways of being connected to the rest of the world. Consequently, engagement in practice entails engagement in both internal and external relations. Anyone can participate in multiple communities of practice at once. A principal is usually, to some extent, engaged in several communities of practice and spanning their boundaries is thus an inherent aspect in a principal's work. Practices may be mutually influential through connections of boundary objects in terms of artifacts and other reifications around which to organise interconnections and brokerage in terms of people who introduce elements of one practice into another. Boundary objects can bridge disjointed forms of participation and enable coordination but also disconnect by failing to bridge

different perspectives and meanings. Such objects can have different characteristics, such as modularity (attending only to parts of the object), abstraction (through deletion of some features), accommodation (one object may be used in various practices), and standardisation through prespecifying (Wenger, 1998, p. 107). However, an object is used through engagement in specific practices connecting to a specific community of practice where understanding these practices and managing the specific boundaries at hand are crucial issues.

The term brokering describes when a person uses multi-membership to transfer elements of one practice into another. Brokering involves translation, coordination and alignment between perspectives and requires legitimacy as well as ability in terms of introducing, negotiating and participating. Boundary encounters in terms of meetings, conversations and visits can take different forms such as one-on-one encounters, immersion or delegations (Wenger, 1998, p. 113). Practice might also provide connections through boundary practices, overlaps or peripheries. Boundary practices form enterprises that deal with boundaries of other practices to address conflicts, reconcile perspectives and find resolutions in terms of some sort of collective brokering. If such a connection becomes established and provides ongoing forms for mutual engagement, a practice might emerge. Overlap is provided by a direct and sustained overlap between two practices while opening peripheries refers to providing peripheral experiences by offering legitimate access to a practice without the demands of full membership.

## Principals in Education and Work

Maintaining identity across borders through multi-membership is a demanding task and a focal interest of this thesis. Wenger (1998) argues that being part of several communities of practice is demanding as competence is defined in different ways in different communities. According to Wenger (1998), it is by practice that a community establishes the scope of a competent practitioner; accordingly, the community of practice acts as a locally negotiated regime of competence. Consequently, it does not need to be the same regime of competence in different practices. The work of unifying different views infers an inevitable identity negotiation. Handling conflicting definitions of competence and coming to know what it means to be a participant in different contexts is part of the learning trajectory. Moreover, to act as the formal leader of a school organisation requires being able to understand the meaning of actions and how they may be perceived from different positions within the organisation as well as creating a common understanding. Therefore, focus shifts from individuals in an organisation to the organisational phenomenon. Consequently, it is necessary to emphasise social

practices as a basic unit of analysis and not solely the individual practitioner. In this thesis, I consider a collective and organisational level to be of particular interest regarding visits at schools, and include both teachers and leaders when capturing these dimensions. This is to understand schools in terms of relations among localities with principals' and teachers' perspectives on how they belong to the organisation, their interpretation of its character, and their forms of knowledgeability (Wenger, 1998).

Wenger-Trayner and Wenger-Trayner (2020, p. 5) made a conceptual split as they introduced the concept of 'social learning space' to refer to social learning that is not linked to any specific community of practice or shared regime of competence. A social learning space may be a pervasive structure or a space between structures created together by participants; thus, a social structure can encompass a single or several overlapping distinctive learning spaces but can also refer to a matter of degree. In a social learning space, the focus is still on people and their participation, as members still drive the learning agenda where learning is rooted in mutual engagement. Thus, meaning and identity remain central in a social learning space. Such social spaces might arise within schools. However, meaning and identity in a social learning space are not based on competence in an ongoing learning partnership that over time has resulted in a shared practice and a regime of competence. Thus, in the context of this study, I understand the educational practice of the principal programme as a potential context for social learning spaces rather than a context for potential communities of practice. This is because even as the educational context can sustain joint engagement, it can hardly provide joint enterprises or shared repertoires over time concerning the principals (but for educators). Rather, as every principal bears in mind the specific school they are leading while attending principals' education, caring is sustained so that specific differences can be made in their diverse respective working contexts.

Within sociality in the principal programme, features of a boundary practice would eventually develop as boundary practices form enterprises that deal with boundaries of other practices. As a boundary practice, sociality in the principal programme may become established as an enterprise dealing with boundaries of diverse schools, sustaining connections between their practices by addressing conflicts, reconciling perspectives, finding resolutions and thus providing an ongoing forum for mutual engagement as sort of a collective brokering forum for how to address conflicts in schools (cf. Wenger, 1998, p. 114). Over time, a community of practice thus may potentially be created that reflects working relations and creates a bridge between respective (school) practices. However, such a boundary-practice might become completely self-involved and insulated from the practices with which it is supposed to connect, failing to create further

connections and creating artefacts with local meanings that do not point anywhere (Wenger, 1998, p. 115). Thus, overlapping communities of practice, or the opening of their peripheries, can connect communities of practice with ‘the world’ by providing peripheral experiences where people can gain access to a practice without being devoted to a trajectory to full membership as part of multiple levels of involvement in the practice (Wenger, 1998). Thus, integration of levels affords opportunities for learning.

These theoretical underpinnings provide an important premise to the study that can be considered empirically. Moreover, like Wenger (1998, p. 118), I argue that overall, this constitutes a complex social landscape of shared practices, boundaries, peripheries, overlaps, connections and encounters in which continuities and discontinuities are defined by practice. Communities of practice evolve in dynamic ways through fluid forms of participation. Their boundaries refer to discontinuities, while their peripheries refer to continuities. A landscape of practice is formed by weaving a complex texture of distinction and association, possibilities and impossibilities, participation and non-participation (Wenger, 1998, p. 121). Within this complex social landscape, I do not explore or define ‘communities’. Rather, I encounter contingent communities of practice, boundary practices and social learning spaces to explore their texture by examining mutual engagement, modes of belonging and identification, brokering across boundaries between practices, bridging and reconciliation, and tensions between competence and experience, with a focus on novice principals’ social learning trajectories in complex and variable social landscapes.

## Chapter 5 Methodology

This chapter presents the research design, methods, analysis, considerations on methodology and research ethics applied in this study.

### Research Design

The focus of this study is principals who are entering their third year in the Swedish National Principal Training Programme. The study follows a design elaborated from the practice perspective for which qualitative research methods are applied to take account of the characteristics of human experience. These characteristics are multi-layered and complex, and as an ongoing flow with a primary purpose of describing and clarifying experience as it is lived and constituted in awareness (Polkinghorne, 2005). In this study, three course groups (i.e., cohorts), each belonging to a separate university as programme organisers, form three groups embedded within the frames of the National Principal Training Programme. Within each of these three groups, educators and principals form a bonded and integrated system in which specific artefacts and mediators are used. Because education in this form is viewed as a specific and situated practice, and practice is characterised by activity and processual character as well as by the critical role of the body and material things, both meaning-making and objective materiality is of interest within each system. This is also the case for specific and situated work settings at the principals’ schools (Nicolini, 2013).

### Comparable Case Selection

The sampling strategy used for the selection of informants is a form of comparable case selection that involves the selection of sites, groups, and individuals with the same relevant characteristics over time and place, i.e., a replication strategy (Lecompte & Goetz, 1982; Merriam, 2009; Miles et al., 2014; Miles & Huberman, 1994).

### Sampling of Educational Providers: Universities

All the time of the empirical part of the study, there were six universities in Sweden offering the state-regulated National Principal Training Programme. Information-oriented sampling was used to sample universities whose participants could be

expected to lead schools located in different regions in Sweden. Each university is responsible for their design of the programme within the framework of the state-regulated objectives. Consequently, this presented varied ways of carrying out educational ventures. After taking note of their information, I sent a request to directors at three universities giving the National Principal Training Programme to carry out the study in one of their course groups attending the last course of the programme during the school year 2018-2019. Access was permitted to two course groups starting their last year of training in Autumn 2018 and one course group starting their last year of training during spring term of 2019. This was made possible after follow-up dialogues with all three directors regarding the purpose and design of the study as well as how to inform participants about the study. All participants in the selected course groups were informed about the study and that observations were planned to be conducted in the educational context during their last year of training. Information about the study was initially given before and during the first course meeting of the participants' last year of training. There were thus several opportunities to ask questions. Information about how to refrain or withdraw from the study was also provided. During the study, new participants were added to the selected course groups on a couple of occasions. They were given information about the study when they arrived. One participant chose to abstain and has thus not been included in the empirical data.

### Sampling of Principals

A sampling frame was elaborated to make the selection of principals for interviews who (as far as possible) would represent the average compulsory school principal in Sweden with respect to external factors. This required an even distribution of principals with responsibilities for years F-3, 4-6 and 7-9<sup>9</sup>, a split of 80% from municipal schools and 20% from independent schools, and two thirds women and one third men (to reflect the proportions of each category). Those principals leading compulsory schools and participating in principals' education within one of the three selected course groups were informed about the possibility of participating in the study. These principals received oral and written information about what full participation meant (i.e., participating in interviews and receiving a school visit). A handful of principals from each of the three course groups

demonstrated interest in participation. A few principals declined due to lack of time. In all, 14 principals were selected for participation in the study.

### Sampling of Teachers and Other Employees

School visits included interviews with teachers and other employees in the schools for which participating principals were responsible, following the practice-based approach. Sampling of teachers and other employees was conducted by each principal following the principle of significant others (cf. Nordholm & Liljenberg, 2018; Skott & Törnsten, 2018). This meant asking each principal to select a small number of teachers and/or employees to ask whether they would consider participating in the study by being interviewed. Principals were informed that it would be good if these employees had slightly different roles and were well acquainted with the school and the principal's work. Each principal was also asked to schedule these interviews during the day. The teachers and employees then received oral and written information from me as the researcher about the study. Their written consent was obtained before conducting the interviews. They were also informed orally and in written form about how to absent from the study at any time.

### Methodological Considerations

Many social and organisational phenomena occur within and are aspects of practices. Using a practice-based approach is challenging in terms of how to capture participation in practice. Nicolini (2013) argues the need for coherence between ontology and methodology, implying that interviewing is not the way to study practice. Because practice is characterised by activity and processual character as well as by a critical role of the body and material things, both meaning-making and objective materiality is addressed and examined in this study. This includes a focus on individual agency, knowledge as a capacity to make meaning and to perform a social and material activity as well as considering the importance of power and politics.

Blossing and colleagues (2018) argue that interviewing can capture essential aspects of the practice of school organisations if the interviewer considers that being human means being in a body, facing a world of symbols and materiality, and therefore adapting an interview to be suitable for investigating practice. This means using concrete topic-related follow-up questions and asking for examples from practice; for example, activities, participants, tools, and meaning-making. Blossing et al. (2018) also state that individual and focus-group interviews can

<sup>9</sup> Years 1-3, 4-6 and 7-9 applies as school forms within the compulsory school while year F, *Förskoleklass* (Preschool class) provides a separate form of schooling, however most often led by the compulsory school principal. A government inquiry (SOU 2021:33) has proposed that year F should be incorporated into the compulsory school.

constitute an interesting combination to elicit sense-made school practice, as the two forms can offer different approaches to answering research questions.

However, even if using interviews to capture practice is contradictory and incomplete (Nicolini, 2013) neither is experience directly observable. The quality of data on participation in practice depend on the participants' ability to reflectively discern aspects of their own experience and to communicate what they discern through language (Polkinghorne, 2005). If I observe principals in the setting of this study (the principal programme) and notice one principal to be talking, laughing and vigorously gesticulating, seeming extremely engaged in dialogue with peers, I might assume them to be engaged with learning content. On the same occasion, another principal that seems disengaged, looking out the window and withdrawing from peers could be assumed to be bored. However, on closer examination, or questioning my observation, it might be the case that the dialogue was not about educational content, while the principal looking out was deeply engaged in reflection about the educational content. Accordingly, it is important to apply a combination of research methods to capture the nature of engagement in practice accurately.

Following practice thus requires methods suitable for 'fieldwork on the move', such as shadowing (Czarniawska, 2007; Nicolini 2013). Through shadowing, researchers have the opportunity to both act as an outside observer whilst simultaneously creating relationships and asking exploratory questions (Czarniawska, 2007, 2014). Taking part in a specific context by shadowing or observing is a useful way of getting to know the local routines and to gain a sense of what might arise in interviews (Kvale & Brinkmann, 2014). Polkinghorne (2005) states that to obtain interview data in order to explore the depth and breadth of experience with sufficient quality to produce worthwhile findings, researchers need to engage with participants and to establish a trusting, open relationship as well as to focus on the meaning of the participants' experiences. The environment in which the interview takes place is an equally important source, and data from observations can shed light on the meaning of a participant's oral comments.

Zooming is a method of foregrounding, backgrounding and exposing the connectedness of different practices. This is achieved by following principals and artefacts between education and working practice, to observe and ask questions in diverse settings in order to get close to practice and practitioners. By zooming out, an appreciation of how local practices relate to larger configurations is made possible. Practice thus becomes versatile for making sense of a variety of organisational phenomena, from the existence of local forms of coordination to complex organisational arrangements and institutionalised forms, without having to abandon practice (Nicolini, 2013).

## Empirical Data

In this study, qualitative methods in form of observations, shadowing and semi-structured interviews were utilised. The empirical phase took place over a 12-months period (September 18, 2018, to September 18, 2019), which importantly corresponded to the period of the participating principals' last year of professional training when they were taking part in the educational context of the principal programme and worked in schools; i.e., each principal's workplace. An overview of the empirical phase in terms of interviews and observations is presented in Table 1.

Table 1 Interviews and observations

Educational organiser University	Course- group	Days of observations [in course- group] in education	Semi- structured individual interviews with principal at educational site	Thematically- structured focus-group interviews with principals at educational site [Principals]	Days of shadowing principals' work in schools	Semi- structured individual interviews with principals in their school	Semi- structured individual or group interviews with staff in principals' school
Total: 3	Total: 3	Total: 23	Total: 14	Total: 3 [14]	Total: 14	Total: 14	Total: 18
A	1	8	4	1 [4]	4	4	6
B	1	7	4	1 [4]	4	4	5
C	1	8	6	1 [6]	6	6	7

## Observations and Shadowing

Observations were conducted at course meetings of the principal programme, commencing from September 18, 2018, through to September 18, 2019. This meant that I was present at the principal programme for seven or eight days for each of the three selected course groups (23 days in total). The course meetings included lectures as well as conversations in smaller groups and each meeting was held for two or three subsequent days. These observations served several purposes. First, it was important to get to know each of the three separate bonded

and integrated systems with its specific artefacts and mediators. This acquaintance was important when conducting the interviews, where the principals talked about and highlighted specific themes and artefacts from their bonded system. Second, shared experiences stemming from our common presence at the course meetings were further explored in interviews. Third, over time, my recurring presence as a researcher increased confidence among the principals such that they were able to share and express their experiences. However, it was important to maintain my role as researcher and not to 'go native' with participants or with educators. In sum, observations functioned in a complementary way in support of interview data.

Observations need to be recorded in written form so that they can be incorporated as textual data (Polkinghorne, 2005). Consequently, notes were taken at the time and semi-structured observation protocols were used for this purpose. The structure supported me to make notes on a) situation, b) content, c) tools, d) instruction, e) engagement, and f) researcher reflections. The detailed structure can be found in the Appendix. The semi-structured notes made it possible to compare observed events with interview statements as well as to make comparisons between sites. When the principals were engaged in group conversations in the principal programme, one group was observed for the whole conversation. On these occasions, I took a passive role as an observer. Occasionally, principals would turn to me as if I was an educator, to discuss some questions about the assignment or to invite me into the group conversations. I declined with reference to my role as observer. In total, observations of group discussions were valuable and provided opportunities to explore ongoing processes of meaning-making and negotiations. In a few cases, participants excused themselves as a group to deviate from the subject of discussion and talk in what they defined as non-professional talk. My interpretation of this is that they did not adapt their way of being because of my presence to any large extent.

The term 'shadowing' can be used to refer to how I followed the complex work of professionals as an observer on the move (Czarniawska, 2007, 2014). When visiting schools, I shadowed the principal's work of the day. Depending on the content of the workday, these observations sometimes included one or more meetings. The same kind of semi-structured observation protocol as I used when observing at the sites of the principal programme was used when visiting schools, and notes were taken partly at the time and partly afterward, depending on the opportunities to write in each situation. Informal chats with the principals were held to sort out operations and talks that were experienced during the day. Moreover, interviews were held in schools during these days; consequently, time for shadowing reduced correspondingly.

## Interviews

The main data in this study was derived from semi-structured interviews with the 14 compulsory principals. Each principal participated in three interviews during this time. Seidman (1991) proposes a sequence of three interviews with a participant to be able to produce accounts of sufficient depth and breadth. Between the interviews, the participant then has time to think more deeply about the experience. The researcher can ask follow-up questions to clarify missing meanings from the first sessions and the participant can add newly remembered information. The first set of individual interviews was conducted at the sites of the principal programme in connection with a course meeting. Second, thematic focus group interviews (one for each of the three course groups) were conducted in connection with a course meeting. All of the fully participating principals engaged in focus group interview process. However, one principal participated in the first two interviews in reverse order. Semi-structured individual follow-up interviews were held at each principal's workplace.

During school visits, I interviewed between one and five teachers and other employees at the school using semi-structured interview guides. Different versions of the interview guides were used for the different sets of interviews (i.e., first interview, focus-group interview, follow-up interview, and teachers' interview). I recorded all interviews digitally and transcribed them verbatim. In the following text, I elaborate my interview practice further.

### *Individual Interviews*

During the interviewing practice, concrete, material and bodily aspects needed to be handled. In this study, this was relevant within the principal programme as well as in school practices. Following Blossing et al. (2018), open-ended questions with follow-up questions and close-ended questions were combined. Follow-up questions about where, what and who became relevant tools to approach the social and material activities and to get closer to practice. This meant that notes were taken during the interview to know what to unpack and follow up during the interview. This sometimes led to the decision to pause briefly just to go through the notes to be sure not to miss something important. The activity characteristic of practice also involves paying attention to how concrete actions unfold over time in a process. This means using concrete topic-related follow-up questions about operations, participants, tools, and meaning-making. Some of the interview questions were retrospective, which Blossing et al. (2018) suggest is of interest as keys in a sense-making process.

Example questions from the semi-structured interview protocols used in this study can be found in the Appendix. An open question at the beginning of the interview allowed the interviewees to explore the first theme related to their meaning, followed by a ‘grand tour question’ to obtain a broad description of the main topic of the interview and to produce aspects to follow-up and unpack during the interview. The grand tour question in the first interview was about how the principal perceives learning in relation to participation in education. The motive for this kind of query construction is theoretical. To better understand professional identities developed by principals during their time in professional practice and education, the relationship between education and everyday work was considered through how principals themselves understand their education and their professional work as well as how they perceive the relationship between education and work.

For some of the interview questions, tools used in the interviews were constructed in the form of post-it notes (cf. Grimm et al., 2021). I used these to maintain a specific structure in the conversation with silent reflection, oral description, and prioritisation of topics. In individual interviews, the tools functioned to focus on the realistic side and not just the idealistic.

#### *Focus Group Interviews*

A focus group interview is characterised by an interview style that bring out a rich collection of views on the topics of the interview (Kvale & Brinkmann, 2014). As the interviewer, I acted as moderator, introduced the topic of discussion, and ensured that there was an exchange of views. The role of the moderator is to make sure that an atmosphere is created that allows the participants to express thoughts on the subject so that diverse understandings emerge. I used tools in the form of post-it notes during focus group interviews to maintain a specific structure with silent reflection, oral description, and prioritisation of topics for the first interview theme. In the focus-group interviews, the tools helped to construct an enabling dialogue where all participants voices could be heard (Grimm et al., 2021).

Collective interaction can produce more spontaneous and expressive understandings than in an individual interview. In a focus-group interview, the researcher is allowed to listen to and observe exchanges that reveal information at both the individual and the collective level. The group perspective may offer broader insights into the collective level through the interactions in the group (Blossing et al., 2018). In this study, the focus group interviews had additional purposes to individual interviews. First, bringing a group of principals from a cohort together helped the participants to remember past experiences in education and to reflect on and to compare their varying ways of experiencing

and understanding the same educational content. Second, discussion and meta-reflection were stimulated through group engagement.

#### *Teacher Interviews*

These mainly followed the interviewer practice as described for the individual interviews. However, these interviews were shorter in terms of the number of questions asked than those with principals. The ‘grand tour question’ in the teacher interviews focused on framing the school in a context. The teacher interviews were conducted either as individual interviews or as a group. I preferred to interview teachers in groups because their interaction during interviews provided important information. However, on some occasions, this was not possible due to their work schedules. Even where held in group settings, teacher interviews were approached as individual interviews with several interviewees and did not follow the thematisation and moderation of focus group interviews as described above. These interviews and the type of schools visited are described in the Appendix.

#### *Analysis*

The practice perspective used in this research (e.g., Nicolini, 2013) framed the analyses together with the aim of the study and the research questions. This means that the analysis work can be seen as integrated in the study’s design, choice of method, construction of interview guides, and implementation, and as an activity that took place over time. The study design was based on the need for additional knowledge according to identified knowledge gaps. The aim and research questions were formulated, an appropriate perspective and method were selected, and considerations about analytical concepts and theoretical input to develop knowledge were made. Some tentative sub-studies based on this ‘package’ were described and were then reviewed and discussed within the local research community at the faculty. This can be seen as the first step in the analysis procedure.

When interview guides were constructed, both analytical questions and concrete interview questions were formulated and the connections between these were made explicit. Planning for the interviews and observations, their structure, flow, themes and which analytical concepts could tentatively be relevant in the analysis were formulated and discussed in different groupings. The observation protocol was practically and analytically tested. Thus, an analytical awareness and disposition emerged as an integral part of the interview and observation practice.

The empirical phase of the study lasted for one year. Observations and interviews in the educational context could thus be interspersed with transcription

and initial analysis steps. Prior to making observations and interviews in the principals' schools, these were prepared by making tentative interpretations and thorough review of the first two sets of interviews with each principal. Uncertainties could thus be followed-up so that clarifying questions could be prepared. The principals also described how the interview series procedure made it possible for them to return to previous issues in order to clarify or provide further perspectives.

When conducting the interviews, an initial interpretation process took place during the interview, which provided an opportunity to validate the interpretation with the interviewee. This also enabled the principals to think further about the interview conversations and in some cases they came back spontaneously to validate, contrast or further develop ideas. This usually happened in the following interview, but also on occasion between interviews. For observations, there were good opportunities to take a critical approach to early interpretations and test these during new rounds of observations. However, overall, patterns crystallised and gradually became more detailed until data saturation was achieved and only 'more of the same' was revealed. In all, this approach can be described as an interaction between proximity and distance where initial parts of analysis in the form of categorisation and interpretation could both be questioned and substantiated, and where theorising of the empirical findings could be tried with the intention of understanding, explaining and exposing aspects of the principals' social learning processes.

Extensive transcription work was carried out on the interview data. Kvale and Brinkmann (2014) describe transcription as a translation from oral to written language where the social interaction during the conversation is lost in the transcript. To some extent, this has been compensated by notes on body language or implicit linguistic features. In addition, as both interviewer and transcriber, I carried recollections of social parts of the interview situation during transcription; thus, analysis was actually initiated during the transcription process.

How the empirical material was analysed is described in each paper. Furthermore, in the following sections, the analysis of each paper is explained and reflected on in greater detail. Overall, the analysis was conducted on the basis of a narrative approach; that is, theoretical analysis was inserted between the original story presented by the interviewees and the conclusions (Kvale & Brinkmann, 2014). This does not mean that the results are reported in the form of narratives; however, taking a narrative approach in analysis has unified the papers. In addition, the approach to analysis can be described as synthesised, case- and variable-oriented.

Both inductive and deductive coding methods were used in combination, as theory can be related and used in different ways with empirical data: grounded and thus derived from observation and inductive searching, or predefined and used deductively as confirmation. Paavola and Hakkarainen (2005) compare these processes to either not knowing (induction) or knowing (deduction). They also add the possibility of knowing something in some respects and not knowing the whole, in the form of abduction (or 'best prediction'). Consequently, abductive searches and inquiries go between knowing and not knowing. An approach of abduction thus means that different sources of knowledge can interact so that new ideas emerge. Overall, the theoretical framing of this study should not be regarded as primarily driven by theory but neither primarily grounded. At the level of analysis, the theory was used as a framework for thinking about learning in terms of communities, their practices, their meanings, and their identities: in constant development, and thus used and tried out empirically. In this sense, I adopted an abductive approach to theory by relating what was inductively revealed to a theoretical framework.

The analysis of each paper is outlined and described as a separate endeavour, each focusing and exploring one part of the whole. For the second and third papers, the observations from the school visit, as well as the interviews with teachers and other employees, were included in each principal's case.

#### *Paper 1*

In the first paper, an abductive approach to theory was adopted in relating the inductive data to a theoretical framework. The focus was principals' understanding of and engagement in the National Principal Training Programme, to explore their formation of identity in the interaction between their education and professional working practice. As a researcher, I placed myself within the frame of education and with a glance directed at principals' working practice from a distance. The interview data were organised using NVivo 12 Pro software for qualitative analysis. In the coding process, interview data from each principal was coded as a specific case to enable both within and cross-case analysis. This means, all three principal interviews were included in the analysis.

Furthermore, the semi-structured observation protocols from the educational sites of the principals' programme complemented the interview transcriptions and were read several times throughout the analysis process. This documentation (including situations, contents, tools, instructions and engagement through observations) assisted in understanding the discussions in which principals described their participation in education. The overall focus of analysis was

engagement and participation in education and work practice in terms of their respective 'doing' and understanding as encountering education and work.

A framework for the modes of belonging in the form of engagement, alignment and imagination (Wenger, 1998) was used to analyse principals' engagement and participation in education and working practice. The analysis also applied specific modes of belonging in the two dimensions of identification and negotiability (Wenger, 1998) to explore various forms of learner identities. Next, I provide a more developed description of the analysis process, including illuminative examples from the empirical material and how the theoretical constructs were used.

When analysing the empirical data for the first paper, I was guided by three key questions: 1) How do the principals describe their engagement and participation in education and in relation to work? 2) What do they do? 3) How do they understand and encounter education and work? Different ways of encountering were distinguished from the data, drawing attention to similarities and differences within and across cases, which were further explored. In this analytical step, different ways of making sense of education and work were identified and labelled according to their orientation toward work that affected how education was experienced and encountered. This labelling is an analytical construct from the interpretation of: What is [talked about as] being led? In the next step, the analytical concept of modes of belonging (Wenger, 1998) was adopted and an analytical instrument was constructed from which theoretical categories were applied. In later works, Wenger argues, that 'modes of belonging' would more accurately have been referred to as 'mode of identification' (Wenger-Trayner & Wenger-Trayner, 2015, p. 28). This is in line with the results of the paper, even if the first term is the one I use.

Each orientation was coded separately and rendered an ideal type (Weber, 1977). An ideal type does not correspond to all characteristics of any particular individual or case but gives emphasis to certain elements that are common to most cases of the particular phenomenon. Consequently, an ideal type is a construct of ideal form, helping to bring order to the social reality in an analytical sense. Thus, each ideal type of learner identity (in terms of the organisationally-oriented, task-oriented and idea-oriented) is formed from essentials of orientation toward work that affects learning. Thus, the typology of learner identities should be seen as a unified analytical construct that can be used as an adequate tool for analysing the learning of principals in social practice. In terms of validity, the typology does not fully correspond to any specific social reality or individual but rather represents elements common to most cases and consequently helps to understand the phenomenon being studied. However, as the three orientations were inductively

identified and interpreted as clearly distinguishable in the empirical material, quotes and examples from the material were selected on the bases of explicitly 'showing' each orientation. In combination with the theoretical interpretation this 'showing' was extended to explicitly discerning what orientation qualitatively meant within each mode of belonging (i.e., mode of identification). In addition, representativeness of the study participants was also taken into account while selecting quotes for the presentation of results to ensure that the results were not one-sided representations of any specific study participant.

At the second stage of analysis, trajectories within the context of principal education were deductively analysed according to the four main categories of participation according to the social theory of learning (Wenger, 1998). The theoretical framework of Wenger (1998) was used mainly to deepen understanding of how professional learning and identity develop in parallel, and in relation to working tasks; for example, when the principals seek to understand their situation and change it (e.g., Saarukka, 2017; Veelen et al., 2017). Because identity is continuously constructed through social interactions and is dynamic over time and space, and therefore must not be seen as defining an individual *per se* but defining an ongoing trajectory within a landscape of practices (Farnsworth et al., 2016; Wenger, 1998; Wenger-Trayner & Wenger-Trayner, 2015), the identity concept also addresses the issue of bridging education and practice (Wenger, 1998).

### *Paper 2*

In Paper 2, Wenger's analytical framework (1998) was used to explore learning as a complex process of social participation. However, the analysis was extended from the situationally and temporal to the historical, individual and collective histories by linking to a specific time and series of events (Des Chene, 1997). For the second paper, I placed myself within the framing of each principal's working practice in their school and with a glance directed at the principal training programme; that is, conversely from how the first paper was conducted. The dynamic of continuity and discontinuity, as well as the tensions between local and global, participation and reification, emergent and designed, and negotiability and identification, were used to investigate the complex meeting between principal and school practices. The term 'reconciliation' is used to describe the process of identity formation across the boundary between education and work and forms of belonging: engagement, imagination and alignment are used to trace individual changes in these processes. Using this theoretical lens was useful in exploring how participation in the Swedish National Principal Training Programme intertwines with principals' work.

The empirical data was analysed with a case-oriented approach in which all interview and observational data were used. Data was condensed by writing summary case reports, one for each principal and one for each school. First, principal case reports were written, compiling and sorting information and expressions into a readable 'story', starting with a retrospective view of working life that described their education and work. By exploring the narrated memories and experiences of work and developing practices using material artefacts as well as their educational participation and eventual connections, principals' approach to and work in their organisations were traced. Second, each school was coded as a case following a structured order where the school characteristics, its context, the history of leadership, the organisational culture of dealing with issues, collaboration styles, the intern form of leadership, and other factors were summarised. These reports made it possible to address the principals as 'incoming principal' to a school's timeline based on a longer time span of the school but also to address schools' pedagogical 'programme coherence' or loss of such.

The analysis was guided by the following analytic questions: 1) How is the spanning of boundaries between principal education and school practice approached? 2) What kind of connections or disconnections occur between principal education and school practice? 3) When introducing or adjusting designs, what kind of communication takes place and how are actions coordinated? 4) How are diverse perspectives approached, and what adjustments are made concerning context? Different approaches and distinctions between working processes were identified through patterns of existing processes. These processes were interpreted as and consequently linked to possibilities for professional learning to take place. Processes were further explored and compared, adopting the analytical construct of reconfiguration by drawing on identification and negotiability as structural issues defined within specific contexts in terms of mutuality and shared action (Wenger, 1998).

Hence, conflictual and developmental processes were inductively identified relating to the encounters that occurred between the principals' perspectives and actions and their schools' history and practices. In addition, teachers' stories touched on these encounters. These encounters were further explored analytically in terms of the dynamic between continuity and discontinuity (Wenger, 1998). The summary reports made it possible to contextualise initiatives as well as to compare the processes and outcomes of different initiatives within a school by contrasting different views of the same activities. The summaries also enabled comparison between schools. Changes of position were identified and further explored analytically in terms of reconciliation; for example, identity formation across the boundary between education and work. Thus, the concepts of boundary and

broker (Wenger, 1998) were introduced to enable to describe these processes in an analytical sense. Individual processes of changes in position were investigated by connecting modes of belonging (Wenger, 1998) to an analytic temporal logic (cf. Meulen, 1995) making it possible to make analytical sense of change in relation to the flow of time within the identification dimension. What eventually challenged and changed engagement was explored within the negotiability dimension (Wenger, 1998).

For the second paper, even though all participants went through processes of either interrupted or continuous learning (or both), quotes and examples from the empirical material were selected for presentation in the results on the basis of explicitly 'showing' the two discernible processes of continuous learning and interrupted learning as well as the process of change of position. This form of selection can be considered analytical generalisation through strategic selection of specifically critical cases (cf. Kvale & Brinkmann, 2014).

Overall, the theoretical framework of Wenger (1998) assisted in deepening the understanding of how the construction of professional identity in complex social landscapes of practice interfaces with processes of professional learning. Connecting temporal logic to the identification dimension of Wenger's (1998) framework (in terms of modes of belonging) made it possible to explore and describe changes in professional identification in the reconciliation process between principal education and principals' work.

### *Paper 3*

For the third paper, the focus was set on the principals' enactment of pedagogical leadership in practice. I connected principals' perspectives on education and practice to policy, schooling and society by zooming out and identifying the enabling tensions and challenges by relating to areas of pedagogical leadership defined by Ärlestig and Törnsén (2014). In analysing the empirical data, I used the case reports for the principals and schools (as described in Paper 2). Descriptive analysis was conducted in relation to the aim and the first research question. In relation to the second research question, principals' pathways into their role of principal were traced and summarised through the original empirical material and the principals' retrospective accounts. Within-case and across-case comparisons were made, searching for eventual patterns relating to the aim and research questions. Accordingly, all empirical material from the study was included in the analysis for this paper.

During the analysis process, I was guided by the definition of expectations of pedagogical leadership as a focus on the core task of teaching and learning (Ärlestig & Törnsén, 2014). This definition includes key factors of directing

engagement through observation of teaching and learning and promoting development, dialogue and learning between actors; providing prerequisites for teaching and learning; organising teaching, learning and distribution of leadership; and relating results and qualities to student learning by evaluating, assessing, analysing and understanding results to facilitate school improvement. These key factors were used to sort the empirical material, rather than normatively framing pedagogical leadership. The analysis was also guided by questions of degrees of coherence or fragmentation in schools' pedagogical programmes and the occurrence of teacher communities of practice. Links were identified and interpreted in terms of changes in alignment.

In sorting the empirical material, obstacles and enablement in relation to principals' work as pedagogical leaders were inductively revealed, showing as legitimacy and capability (or a lack thereof). The analytical framework and constructs of experiences and competencies (Wenger, 1998) were used to make analytical sense of the findings through the already-stated analytical focus on enabling tensions. This approach is thus recognised as abductive. In the presentation of results, quotations were selected to exemplify the main results in terms of enabling tensions as well as challenges experienced by principals and teachers. This required the exclusion of any 'outliers' or eventual 'remarkable' quotations from the empirical material.

To specify the concept of experience in the form of a personal journey (Wenger, 1998) in relation to the study, the terms of *professional socialisation* in terms of formal preparation and experiences from practice and *organisational socialisation* in terms of becoming familiar with a specific practice and a specific context (Crow, 2006) were used. These consequently complemented Wenger's concepts while constructing the analytical, conceptual frame. Because learning necessitates a process and a place (Wenger, 1998), these concepts were specified in relation to the study in terms of *induction to principalship* (i.e., process) and *principals' education* and *principal's workplace* (i.e., places). The theoretical framework (as described) was used to explore and deepen the understanding of how experience and competence develop in parallel and become part of professional identity and professional learning.

Because the obstacles experienced by the principals in their enactment of pedagogical leadership in practice were connected to educational and societal structures beyond their direct control, these were linked to the overall paths of principals as they appeared in the empirical data. A metaphorical perspective was used to create images of pathways through a landscape of practices in the second stage of analyses (Morgan, 1986; Wenger-Trayner & Wenger-Trayner, 2015). The reason for this was to gain insight into how contemporary principalship relates

to historical aspects of principalship and a decentralised educational system (cf. Wenger, 1998). Morgan (1986) demonstrates how ideas about management and organisation are built on implicit and incomplete images, arguing that we can create new ways of thinking by trying out alternative metaphors.

As a method of analysis, Morgan's approach can be used as a tool to unpack and highlight dilemmas and problems that are inherent in structures as well as how we think about them (Austrom, 1987). However, Wenger-Trayner and Wenger-Trayner (2015) also use the image of pathways through landscapes of practice; consequently, this notion is inherent in Wenger's (1998) social theory of learning. The metaphorical perspective helped deepen the knowledge about principals' pedagogical leadership in relation to their preparation and overall professional pathway. This was achieved by enabling the connection of process and place in terms of investigating how pedagogical leadership unfolds in practice. This theoretical framework helped to reveal challenges, as competence and experience were revealed to be unaligned with context and practice, impairing both pedagogical leadership and principals' learning in education. Through the metaphorical perspective, this was understood as non-constituting in terms of suitable 'equipment' in terms of competence being unaligned, thus failing to account for taking on pedagogical leadership in practice.

## Considerations of the Study

Good quality in research can be considered in one sense an overall assessment, whereby individual requirements cannot always be broken into parts. The quality should be judged on the originality of the combined properties, external and internal validity, precision, and ethics (Vetenskapsrådet, 2017). Sincerity in research refers to transparency about the researcher's biases, goals, and foibles (Tracy, 2010). Credibility refers to the trustworthiness of the research findings. All these different but related aspects are continuously woven into the research process. As a researcher, such considerations are never complete as they also are part of the way results are reported and discussed.

## The Role as Researcher

Sincerity as a researcher includes being transparent about the reflections and choices made during the research process. The fact that I am experienced in leading development work in school environments, experienced in educational settings, know literature within the fields where the programme is situated, have experiences from both working in practice with principals and work as an educator

of (experienced) principals means sharing an overall repertoire with principals, teachers and educators that has been an asset in the interviews. Eventually, this could be viewed as a bias in the research; however, my role as researcher functioned as a distancer to former experiences. On the contrary, former experiences functioned as a knowledge resource. Whatever the principals discussed, I was almost always knowledgeable of and able to initiate follow-up questions. In the case of interviewing leaders, who are used to talking about their thoughts and opinions and who might also have prepared conversation tracks to mediate their opinions, skilful interviewing was required, as well as being expert in the interview topic and to some point even taking a confrontational stance in the discussion (Kvale & Brinkman, 2014). Considering this, interest as an interviewer was based on the practice perspective. Whenever an interviewee shared their opinion, this was allowed to pass by and the focus was taken back to the interviewees' actions as leader of the school organisation.

Researchers can influence the research process and it is almost impossible to eliminate the researcher effect in total. This became evident at one point, as an interviewee approached me and told me that the interview conducted on the previous day had changed their view of the second course-year because of the meta-reflection on this experience that occurred in the interview. As Polkinghorne (2005) states, reflection on experience may serve to change the experience. In addition, people do not have complete access to their experiences. The capacity to be aware of, or to recollect one's experiences is limited. Experience can also be more complex and nuanced than can be expressed with literal language. Despite these limitations, language is our primary access to people's experiences (Polkinghorne, 2005) and probably the most feasible way of investigating the meaning of events for participants. It is the interviewer's task to help unpack experience and gaining access to deeper levels and more nuanced descriptions (Polkinghorne, 2005). It is also the interviewer's task to be knowledgeable in the specific subject matter as well as to gain knowledge about the environment and power relations in the settings where the study is taking place (Kvale & Brinkman, 2014). This is why time was spent observing and being in the different environments of the programme. Knowledge about and experience of a specific environment can also serve to enhance understanding of tacit knowledge, as largely unarticulated, contextual understanding that is often manifested in nods, silences, humour, and nuances. Altheide and Johnson (1994) argue that to illustrate the complexity of data, researchers are advised to show; that is providing enough detail so that readers can draw their conclusion alongside the researcher. Immersion and concrete detail is necessary to ascertain tacit knowledge and to understand body language. In interview transcriptions of this study, notations in parentheses about

details of body language, laughs, gestures, and tacit understandings were made, which provided important for supporting understanding of the interviewee's expressions.

### Credibility

It can be said that the conclusions (in relation to the knowledge claim) and their validity are related to the research perspective taken as well as how the research tools and the empirical material are managed. The use of theory may help to attain validity of the conclusions as well as construct validity. In terms of the practice perspective, this approach to the design enhanced the overall validity of the study. The interview questions were constructed with theoretical concepts in mind, although they were translated into a language that could be spoken in a practice setting; that is, 'the language of the participants'. Moreover, my observation protocols were designed from a theoretical perspective, which helped to make systematic observations and preliminary categorisations of what was observed.

In this study, observations were complementary to the interview data; in addition, the educational and school contexts complement each other. If a principal expressed certain views in interviews, there was always a possibility that the time spent in education and work contrasted what was expressed verbally; thus, it was possible to explore issues further. Put another way, Bloor (2001) suggests that findings may be judged valid when different and contrasting methods of data collection yield identical findings on the same research subject: a case of replication within the same setting. In this study, replications were identified through interviews and observations, but also from visiting several universities that offer the same programme, several course groups within the same programme, visiting several schools where the principal participated in the same educational context as other principals, and interviewing both principal and teacher working in the same organisation.

A closely aligned concept here is multivocality. Multivocal research includes multiple and varied voices that arise within the qualitative report and analysis. Multivocality emerges (in part) from the '*verstehen*' practice of analysing social action from the participants' point of view. Thus, a '*verstehen*' approach requires researchers to provide a thick description of actors' performances and their local significance to interpret meaning (Lindlof & Taylor, 2002). For example, this can be achieved by asking principals about their perception of education and learning, or to ask teachers about their understanding of operations in school. In this way, these frames have guided me when planning and conducting the study as well as in analysing and reporting the findings. Examining a range of both similar

and contrasting cases by following a replication strategy has helped to strengthen the precision, validity and stability of the findings (Miles et al., 2014; Miles & Huberman, 1994; Yin, 2015).

This study is not generalisable, which means it lacks external validity. However, generalisation in a qualitative study implies theoretical and analytical generalisations (Yin, 2015) which is also the case for this study. The extent to which findings can be replicated by other researchers is referred to as reliability. Because practice happens in real life, the specific events cannot be replicated, only approximated. However, the study design can be replicated, and the researcher's interpretations can be tested from the empirical material, how the study is conducted in all its parts, and participating in discussions and arguments about the results at conferences, seminars and peer-review procedures. In that sense, reliability concerns the extent to which the results are consistent with what happens during the research.

### Ethical Considerations

The ethical considerations of research are largely about finding a balance between different interests, such as protecting those who participate while ensuring the production of knowledge. The ethical requirements and expectations placed on a researcher are also closely linked to the researcher role as a whole. An important starting point is that research is important to society and citizens through the improvements that research-based knowledge can lead to, in accordance with the so-called quest for knowledge. In addition, research results have intrinsic value. Therefore, it can be considered unethical to refrain from research and to fail to build on our common knowledge (Vetenskapsrådet, 2017). During the planning phase of this study, consideration about the ethical concerns relating to all study participants in a mandatory education was undertaken. Participants as learners goes through processes that needs to be respected. Conversely, making education mandatory (thus 'forcing' participation) while not researching what such participation means for participants and schools could also be considered unethical. Consequently, these aspects need to be balanced when planning each aspect of the study.

A key aspect of the study was maintaining confidentiality for the principals and the organisations while still enabling this research. The confidentiality requirement applies to all participants; in this study, this applied to individuals as well as groups and schools. In addition, confidentiality applied to specific matters and individuals who were supported during coaching dialogues. Regarding observations, no names or personal details were recorded. In interviews, names of people and places

such as specific schools and principals were sometimes mentioned. Accordingly, these were omitted from the transcriptions and instead identified with a pseudonym (i.e., School A, Person X). Knowledge of my presence at course meetings, schools and specific sites was impossible to avoid. Moreover, statements or descriptions of schools might be recognisable from the data. As far as possible, I tried to anonymise people and places by using fictitious names. The risk that it might be possible to recognise a connection ultimately should be weighed against the needs of the research.

The quest for information requires that information about the purpose of the research and the conditions for participation are given to participants, whose subsequent acceptance and agreement to participate is their right and is voluntary. Further, knowing who is responsible (the researcher) and how to refrain from participation (withdrawal) is important, as is understanding the context and benefit of the research. During the initiation phase of the study, the directors of each of the participating providers of the National Principal Training Programme were contacted. A dialogue on how to best meet the information request was conducted and an adaptation to the circumstances of the respective programme organisation was made.

All groups had rich and ongoing opportunities to ask further questions and to obtain more information about the study. At each subsequent course meeting, a new oral and more concise description and presentation of my presence and the purpose of my presence was given. On occasion, individual participants joined course groups during the year, to whom written and/or oral information was given separately. One participant who joined during the year in one of the groups chose to abstain. Thereby no conversations in which this individual participated were observed.

The method of observing a practice by participating in a context, following people's interactions and keeping notes engenders some ethical issues. The first requirement is that people who are the subject of research are informed that this is ongoing. In this study, observations were made in a first step in the context of the National Principal Training Programme. Information was provided according to what has been described. In addition, on each occasion when a group's conversation was observed, I asked for the group participants' permission to observe the conversation in question. This means that participants are invited to give recurring and ongoing consent and have further opportunities to withdraw from the study. Miles and Huberman (1994) call this regular checking and renegotiation.

Personnel at the various schools who were interviewed as part of the study received written and oral information about the study and gave their written

consent. Here, I emphasised the possibility of refraining from participating at any time during the course of the study (as they were provided with my contact details as the person responsible). I consider this to be an ethically important issue, as they were asked to participate by their manager (which could infer undue pressure to engage). However, no one chose to abstain. In cases where I was present in specific contexts (such as meetings), the specific individuals who participated and were observed were given oral information about the study, my role, specific detail of what was studied in the context, and were then asked whether or not they wanted me not to attend. Where some situations were identified as inappropriate by some party for ethical reasons, I withdrew. However, even where I did participate, I took great care in what was noted so that no person would be harmed. Moreover, there is no interest in what has been studied other than the situation, operation, and interaction in the specific context to gain a common understanding of the work and its meaning, not the individuals themselves. However, ethical dilemmas could arise during observation. Sensitive information on other individuals not included in the study might be revealed as well as information that is subject to professional secrecy. In this study, no notes were taken that could link such information to a specific person.

Interviews in the educational settings led to some issues arising. Interviews could not disturb participation in education, and the educational programme was fully scheduled during course days. This meant there were some difficulties in scheduling interviews and the principals' 'spare time' slots (that they could otherwise use freely) were used to conduct the research. However, in return they gained time for reflection with the help of interview questions. Another issue that arose during interviews and observations in the educational settings (reported in the first paper) was that not all participants were fully engaged in the process. Full engagement was also encouraged in educational settings interpreted as encouragement to become a 'full insider'. As a researcher in this environment, I was both able to experience this through observation and by hearing about principals' experiences in interviews. This shaped social hierarchies and different groupings among participants, which were described both by 'full' insiders and by those with peripheral or marginal positions. It could be discussed whether it was unethical to gather principals in focus groups, making interviews because their diverse forms of engagement were obvious. However, as the principals work in diverse groupings throughout the whole of education, this did not play out differently in these focus groups, even though it was as explicit there as anywhere else. However, I do argue that these social hierarchies need to be considered when planning and carrying through research as well as principal education.

Ethical considerations concerning the empirical data are equally important, in terms of transcription, analysis, presentations of findings and discussion of results. Transcriptions and analysis were carefully dealt with, well aware of the risks of researcher bias. Consequently, analysis was repeatedly questioned and reconstructed to make sure not to privilege some aspects of empirical findings over others. In presenting and discussing findings ethical considerations continuously need to be considered. My guiding light here is the practice perspective used for this study, which I consider to be an important part of ethics regarding principals in education. As policy and research highlight 'the principal' as crucial to the success of schools, it might be considered unethical to even talk about the obstacles faced by principals in everyday work. I interpret this as 'the principal' being put on a pedestal, almost canonised, and therefore becoming untouchable. I find this to be unethical as it hinders real people developing into real professionals of societal importance, and placing demands on supportive environments. Thus, this study might present a challenge by giving voice to real principals in real circumstances, making visible their personal assets as well as their experienced shortcomings while arguing contextually that it would be unethical to treat participants as merely politicised 'principal silhouettes' instead of as real people.

Uny et al., (2017) argue that both educational policy and practice and educational research have been politicised. Beach et al. (2014) found how education for educationalists (in term of teacher education) is more ideological than scientifically-based but that some paths of political-ideological thought is not very successful in influencing school practice. Principal education is certainly not free from politics. The policy-based training-programme is ideological and politicised by nature, with the aim of principals being able to implement national mandates. Because the programme is handled by universities it also requires scientific evidence; however, this may result in a problematic reductionism which may lead to easily made solutions for complex issues, as Uny et al. (2017) argue. In this study, I view education policy as idealistic, aimed at an imagined principal or silhouette. However, if also principal education—through politicised objectives—is aimed at the imagined principal, forgetting the actual people who transform their professional identities into actual principals, this becomes problematic. Consequently, through this study I argue for the ethics of framing and exploring real people in terms of novice principals who are meeting policy expectations and handling them in realistic and real educational environments. In this politicised setting, I position myself close to practice, listening to the voices of real people in real settings. Moreover, the study offers interpretations by synthesising findings from the three papers and by zooming out. From a social learning perspective,

claims of competence are negotiated within the politics of competence of a community of practice, at the same time as claims of knowledgeability are negotiated within the politics of knowledge in a landscape of practice (Wenger-Trayner & Wenger-Trayner, 2015). Those claims are part of what I study and will be discussed further on in my work.

A final point concerning ethics and data: a data retention plan was prepared and approved. The research material will be stored and archived according to requirements and in accordance with the University's guidelines. The right to make use of information means that collected material should only be used for research purposes, which will be followed.

## Chapter 6 Results

This chapter presents brief summaries of the three papers that are included in this thesis. Table 2 presents an overview of the content of these papers, including their aims and research questions. Taken together, the three papers provide answers to the overall aim and research questions of the thesis.

## Summary of the Papers

Table 2 Overview of the three papers of the study

Paper	Aim	Research Questions	Theoretical Framework
<b>Paper 1</b> <i>Educating school leaders: Engaging in diverse orientations to leadership practice</i>	This aim of this paper is to broaden the understanding of how novice principals understand and engage in principal training and how their identity form in the interaction between their school leader education and professional working practice.	How do novice principals participate in education and does this participation influence their experience of working practice? What sort of learner identity is negotiated in becoming principal and how can the work of developing a professional identity as principal be described?	Wenger's (1998) social theory of learning. A framework of three modes of belonging, as described by Wenger (1998), in the form of <i>engagement</i> , <i>alignment</i> and <i>imagination</i> appearing within the dimensions of negotiability and identification is used. Furthermore, relations of <i>participation</i> and <i>non-participation</i> were analysed in terms of <i>learner-identities</i> and <i>trajectories</i> (Wenger, 1998).
<b>Paper 2</b> <i>Participation in the Swedish National Principal Training Programme: How does it intertwine with principals' practice?</i>	This paper explores how participation in the Swedish National Principal Training Programme actually intertwines principals' work.	How can new principals learning in practice be described and how does the learning relate to their participation in the programme? How can this professional learning be understood in relation to the role of a principal?	Wenger's (1998) social theory of learning. Dualities as described by Wenger (1998) are used as analytical concepts to explore the dynamics between <i>continuity</i> and <i>discontinuity</i> as well as the tensions between <i>local</i> and <i>global</i> , <i>participation</i> and <i>reflexion</i> , <i>emergent</i> and <i>designed</i> , <i>negotiability</i> and <i>identification</i> . The analyses were extended to historical, individual and collective histories by linking to a specific time and series of events (Des Chene, 1997). The term <i>reconciliation</i> is used to analyse identity formation across the boundary between education and work and forms of belonging: <i>engagement</i> , <i>imagination</i> and <i>alignment</i> are used to trace individual changes in these processes through analytic temporal logic.
<b>Paper 3</b> <i>Novice school principals in education and the enactment of pedagogical leadership in practice</i>	The aim of this paper is to describe and deepen the knowledge of novice principals' enactment of pedagogical leadership in relation to their preparation and overall professional path toward principalship.	How does pedagogical leadership unfold in practice in terms of challenges concerning novice principals' enactment of pedagogical leadership? How can these challenges be understood in relation to principals' path into principalship?	Wenger's (1998) social theory of learning. A framework of Wenger (1998), further developed by Wenger-Trayner and Wenger-Trayner (2015), is used to explore enabling tensions between <i>experience</i> and <i>competence</i> in the process of induction to principalship at the places of principal's education and workplace. Additionally, the metaphorical perspective of Morgan (1986) was used to relate the challenges of pedagogical leadership to novice principals' pathways into the principalship.

## Paper 1: Educating school leaders: Engaging in diverse orientations to leadership practice

The first paper explores how novice principals understand and engage in principal training and investigate their formation of identity in the interaction between school leader education and professional practice. Internationally, there is a growing realisation that principalship requires specific preparation (Forde, 2011). According to studies of school leadership education, it is important to emphasise relevant content, learning-oriented leadership, organisational development, and change management. However, any educational feature can result in very different outcomes depending on how it is understood by participants (Darling-Hammond et al., 2010). To explore this further, the research questions framing the study were: How do novice principals participate in education, and does this participation influence their experience of working practice? What sort of learner identity is negotiated in becoming principal and how can the work of developing a professional identity as principal be described?

As a theoretical point of departure, Wenger's (1998) social theory of learning is used within a practice perspective. The study's primary focus is on learning as social participation in situated practices, and three modes of belonging, as described by Wenger (1998), are used as analytical constructs in the form of engagement, alignment, and imagination appearing within the dimensions of negotiability and identification. This means that in this study, modes of belonging are understood through how the principals engage in their education as well as in their working practice, how they imagine themselves and their possibilities at work, and how they align this to their role in society and education. Moreover, trajectories within the context of principal education were deductively analysed according to the four main categories of participation according to the social theory of learning (Wenger, 1998).

Through observations, individual interviews, and focus group interviews, three learner identities and a corresponding typology were revealed. In addition, it was found that professional identity either enables or restricts the way practice is experienced because principals engage in diverse leadership practices. How the novice principals participate in education significantly influences their experience of working practice. The analysis shows that organisational-oriented principals participate with fully engaged alignment in education and their experience of working practice is one of negotiating meaning, shaping communities of practice, and therefore changing school practice. In contrast, task-oriented principals participate with nonengaged alignment in education, and their task

orientation seems to result in experiences of overwhelming amounts of work duties. Conversely, idea-based oriented principals participate in education with nonaligned engagement. Their experience of working practice is one of struggle and conflict. The results further show that organisational-oriented principals negotiate an identity of participation and competence that can be described as an inbound trajectory to becoming full insiders. However, task-oriented principals negotiate an identity of nonparticipation that is described as a peripheral trajectory. Lastly, idea-based oriented principals shift between being intensely engaged and non-engaged and negotiate an identity of ambivalent participation. This is described as being on a problematic trajectory of marginality that keeps them in a marginal position or results in them leaving the profession. The analysis also unpacks work orientation as a foundation for what kind of existing leadership understandings novice principals bring into education and work as well as show how this affects both learning and the principals' experiences of work in practice.

The main conclusion from this study is that it is crucial to emphasise not only a programme design and educators but also participants, especially their orientations and understandings of education and working practice. In addition, it seems to be crucial to promote participants' shift to an organisational orientation to encourage full participation. The paper contributes to the research field of the education of school leaders by exploring how novice principals understand and engage in principal training and how their identity is formed in the interaction between school leader education and professional practice. In addition, the novice principals in this study understand and engage in principal training in diverse ways, which also affect their formation of identity and their understanding and experience of working practice. This means that novice principals graduate with different approaches to their work regardless of the national curriculum for school leadership education. To some extent, the fear of a united programme design resulting in only a global picture of good practice being presented to participants turned out to be true; however, this result was due to the participants' pre-existing understanding of and orientation to work practice.

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## Paper 2: Participation in the Swedish National Principal Training Programme: How does it intertwine with principals' practice?

The second paper of this thesis explores how participation in the Swedish National Principal Training Programme intertwines with principals' work. International research has begun to highlight the importance of knowledge gained in practice as well as knowledge gained in formal education for principals. Thus, blending programme participation with participants' engagement in leadership practice has become a common feature due to the anticipated benefits (Dempster et al., 2011; Walker et al., 2013). However, participation in principal programmes that include practice does not guarantee that participants will adequately develop their skills and understanding, because they will experience programmes differently (Darling-Hammond et al., 2010; Huber, 2013; Jerdborg, 2022). To explore how participation in the Swedish National Principal Training Programme intertwines principals' work, this study addresses two issues: 1) how new principals learning in practice can be described and how the learning relates to their participation in the programme and 2) how this professional learning can be understood in relation to the role of a principal. The framework of Wenger (1998) is applied for this exploration to determine its usefulness in the context of principals in education and work.

Wengers' (1998) theory of social learning, and broad conceptual framework are used in this study to explore learning as a complex process of social participation. From this standpoint, learning is a process of social reconfiguration that has the power to transform practice. Learning also implies opportunities to change position by letting go of the old identity while shaping a new one. It is assumed that the influence of education is mediated by the principals and their schools and that the principals' identity formation over the boundary between education and work constitutes the work of reconciliation. The dynamic of continuity and discontinuity, together with tensions between local and global, participation and reification, emergent and designed, and negotiability and identification, were used to investigate the complex encounter between the principal and school practices. The analysis thus was extended from the situationally and temporal to the historical, individual and collective histories by linking to a specific time and series of events (Des Chene, 1997). The term reconciliation is used to describe the process of identity formation across the boundary between education and work, while different forms of belonging in terms of engagement, imagination and

alignment are used to trace individual changes in these processes through analytic temporal logic (cf. Meulen, 1995).

Through observations and interviews with principals in their educational and in their workplace practice together with interviews with teachers in the schools, this study reveals processes of both continuous and interrupted learning. Processes of continuous learning connect practice to what was learned in the Principal Programme. Introduction and adjustment of design in practice were communicated within schools, and actions were coordinated and adjusted out of what emerged in practice. Situated negotiations were used to work things through, and meanings were linked to boundary objects. Thus, shifts in position and mutual adjustments of identification were possible. These processes also mend and bridge old practices with new ones within schools and therefore facilitate change. By contrast, processes of interrupted learning disconnect practice from participation in the Principal Programme, which leads to discontinuous practices and exits. Local issues of practice and global issues from the programme were not negotiated and were experienced as ruptures in practice. Communication around needs for actions and introduction of design was insufficient and therefore actions were not coordinated. Situated negotiations did not take place; meanings were linked to identity and therefore positions became fixed. These processes led to discontinuity and withdrawal.

The principals' professional learning was understood as a work of reconciliation; that is, the process of identity formation over the boundary between education and practice. This work was shown to lead either to resolutions or struggles. The principals who engaged in working themselves through describe this as a work of exploring alternatives and envisioning possible futures as well as connecting several perspectives. Meaning is negotiated and boundary objects used. In this process, the principal also negotiates their own role and becomes a broker, which was shown to render legitimacy in their practice.

Using Wengers' (1998) broad conceptual framework enabled the creation of a deeper understanding of this complex topic. As a result, this study contributes to the field of principal preparation and professional development by unpacking processes of social learning. The main conclusion of this study is that principals need to engage in situated negotiations considering the schools' local context and that working with bridging and brokering and using boundary objects in the form of global decontextualised knowledge supports individual principals' professional learning. This is important knowledge for principal education. The theoretical approach used shows that researching leadership learning involves studying specific practices with the use of a suitable theoretical framework.

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### Paper 3: Novice school principals in education and the enactment of pedagogical leadership in practice

The third paper of this thesis explores principals' enactment of pedagogical leadership in practice in relation to their path into principalship. Leadership for teaching and learning is particularly challenging for novice principals (Arar, 2018; Oplatka & Or, 2020) but crucial for student learning (e.g., Goldring et al., 2009; Leithwood & Seashore Louis, 2011; Robinson, 2010). It is argued that principals' preparation can be enriched by understanding their pathways (Murphy, 2020); however, few studies relate the professional backgrounds of principals to their leadership practices (e.g., Bastian & Henry, 2015; Hitt & Player, 2019; Murphy, 2020).

In Sweden, the work performed by a school principal concerning teaching and learning is conceptualised as 'pedagogical leadership'. Since the 1950s, this has been suggested to be an essential part of a principals' duty (Ståhlkrantz, 2019). Nevertheless, in Sweden, principals allocate less time for pedagogical leadership than principals in other OECD countries (cf. Skolverket, 2014). Because student results have been declining in Sweden, greater focus has been placed on the promotion of pedagogical leadership. Thus, education for novice principals was made mandatory in 2010. To describe and deepen our knowledge of novice principals' enactment of pedagogical leadership in relation to their preparation and overall professional path toward principalship, this study specifically addresses two research questions: 1) How does pedagogical leadership unfold in practice in terms of challenges concerning novice principals' enactment of pedagogical leadership? And 2) How can these challenges be understood in relation to principals' path into principalship?

The social learning perspective of Wenger (1998), further developed by Wenger-Trayner and Wenger-Trayner (2015) is used to frame this study. From this perspective, neither actions nor activities achieve meanings in and of themselves. Instead, specific meaning is acquired in the context of social processes of negotiation in practice, and education is understood to be a mutual developmental process between communities and individuals (Wenger, 1998). Wenger (1998)

considers the community of practice key to organisational competence, and membership in a community of practice is a matter of mutual engagement—regardless of a member's title—as participants can have different roles. Thus, a school principal may be engaged in a teaching and learning community of practice, even if they have acquired a different status concerning daily work. The influence of the leader is understood to be mediated by the communities in which meanings are negotiated in practice. Furthermore, Wenger (1998) argues that competence and experience need to remain in tension to enable learning and include learning in the community. Competence may drive experience—or vice versa—and learning can thus be characterised as a change in the alignment between competence and experience.

Consequently, an analytical focus was set on enabling tensions between experience and competence. Competence is viewed along three dimensions: the ability to engage and respond, to understand the practice, and to make use of the practice repertoire. Learning necessitates a place in which to define an identity of participation; in this study, places of principal's education and workplace. Gaining experience is viewed as a personal journey through a social landscape of practice. The concepts of professional socialisation and organisational socialisation (Crow, 2006) are used to specify the journey. According to Wenger (1998), learning also necessitates a process; in this study, a process of induction to principalship. In addition, a metaphorical perspective (Morgan, 1986) was used to create images of pathways and thus gain knowledge about how the challenges of pedagogical leadership can be understood concerning novice principals' pathways into principalship.

Through interviews with principals (in their educational and workplace practice), and by observing them in educational settings and shadowing principals in their working context together with interviewing teachers in the principals' schools, this study demonstrates the challenge of unaligned competence and experience, not only with practice and context but also with leadership practice, impairing both pedagogical leadership and principals' learning in educational contexts. However, the results also show that experience and competence aligning with practice and a situated context enable novice principals' enactment of pedagogical leadership. Engaging with teachers by responding to their actions while using a deep understanding of practice in context and making sensible use of the practice repertoire becomes enabling because competence and experience—each of which can be considered drivers—are kept in tension.

Challenges can be understood as non-constituting in terms of suitable equipment and not making provision for taking the lead in excursions through the landscape. Using this focused metaphorical perspective deepens understanding of

how challenges and pathways interrelate. Exploring pathways in the Swedish setting made it clear that novice principals tend to lack custom equipment for the excursions they are about to lead. Thus, their contexts do not make personal trajectories possible in terms of offering a past and a future when defining their identity through participation in the process of becoming pedagogical leaders.

This study contributes to previous research by providing empirical results that highlight the need for principal educational programmes to promote the shift to leadership by focusing on merging leadership knowledge with the pedagogical content knowledge (PCK) of the principal's school's practice. This means participants not only need process and place, but also reasonable professional paths, which principal education cannot address without connecting to a wider educational landscape. Thus, contributions are made by providing empirical evidence from the induction phase of novice principals to the theoretical constructs of Wenger (1998) that enhance the analytical clarity and empirical base for these constructs. Moreover, by defining a conceptual framework for investigating the tensions between competence and experience, this study contributes theoretically to the research field of principal development.

Using Wengers' (1998) broad conceptual framework in combination with the metaphorical perspective of Morgan (1986) enabled description of the challenges principals face. This provided a deeper understanding of their enactment of pedagogical leadership practices and how aspects interrelate in terms of the preparation of school principals, together with their enactment of pedagogical leadership in relation to their path into principalship. By using a metaphorical perspective, images of pathways through landscapes facilitated understanding of interrelated aspects that need to be studied together to understand how pedagogical leadership is enacted in a specific setting. The study clearly shows that pedagogical leadership cannot be distinguished from what is to be led or from the context in which it occurs, and that profound knowledge and experience are important aspects of pedagogical leadership.

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## Chapter 7 Discussion

In the following, the key findings of this study are summarised, discussed and elaborated upon. Further, by relating these results to previous research, this study's knowledge contributions are introduced. Their implications for education and practice are presented and related to political intentions. Contributions to methodology, theory and theoretical implications are also presented. The aim of this thesis was to explore novice principals' learning and their understanding of principalship in a Swedish context as principals are socialised into the role through education and practice. Learning and understanding are approached as processes with respect to principal's education and practice, with its multiplicity of relations within communities, schools, principal education and society writ large (cf. Lave & Wenger, 1991). Accordingly, four threads will be introduced and explicitly discussed before being interwoven under the heading *Importance of Principal Training*. Thus, the whole fabric of this chapter does answer the aim and research questions of the study.

### Four Threads Entwining the Learning of Principalship

The first two threads to be introduced—*Principals' diverse role interpretations direct their engagement* and *Developing professional experiences into leadership ability*—discuss and respond to the first part of the first research question: How do principals engage in principal training in the interaction with their professional work practice? This is achieved by first drawing on the diversity of role interpretations of the principals in this study and second by discussing how the principals develop professional experiences into leadership ability through intertwined engagement in training and practice.

The third and fourth thread—*Approaching the role and work of a principal* and *Understanding principals' processes of learning*—relate to both the first and the second research question. To answer the second part of the first research question: How can principals' process of learning and understanding be explained? the school leader role, in terms of being principal in a contemporary school first needs greater focus. This relates to the second research question: What is the importance of principal training in relation to the creation of a coherent school leader role for a contemporary school context? This part, consequently, will approach the role

and work of the principal in terms of the third thread, and in terms of the fourth thread approach the principals' processes of learning.

### Principals' Diverse Role Interpretations Direct Their Engagement

The first thread makes explicit three ways of participating in the Swedish National Principal Training Programme, each influencing how working practice is experienced. These ways are described as sets of learner identities, negotiated in relation to becoming a principal. Each way thus describes the work of developing professional identity through intertwined engagement in training and practice (Jerdborg, 2022). Professional identity can be discussed in terms of role interpretation that emerges through the principals' orientation towards work. In sum, these results display how the orientation of the principals in this study enables or restricts their experience of education and practice. The importance of awareness of programme participants' orientation toward the work and role as principal through organisational orientation, task orientation, or idea orientation is consequently highlighted.

One role interpretation among the principals is 'orientation toward organisation'. This emerges primarily through principals linking strategic analysis and results to managing operations and people within the school. Principals oriented towards organisation intertwine education and work smoothly and align to education as a resource for learning, using analytical tools to enhance understanding. Another role interpretation is 'orientation toward working tasks', which emerges primarily through principals coping with duties in the form of separate tasks. Task orientation connects to the 'invisible contract' in terms of leaving teaching issues to the teachers and, as principal, being autonomous regarding organisation and administration, including discussing operational issues of the school with other professionals than the teachers. Principals oriented toward working with tasks tried to sort and link educational contents to specific working tasks, resulting in experiencing education as theoretical, abstract and difficult to understand and using mechanistic approaches at their schools. The third role interpretation—'orientation toward ideas'—emerged through principals focusing on their own ideas for school development. These principals adjust their participation in the programme to their specific and narrow ideas (Jerdborg, 2022).

The organisational-oriented principals participate in education with engaged alignment. Their experience of working practice is one of negotiating meaning, shaping communities of practice, and changing school practice. Moreover, they negotiate an identity of full participation and competence in education

(described as an inbound trajectory) to become full insiders. By contrast, task-oriented principals participate in education with unengaged alignment, resulting in experiences of overwhelming amounts of work duties. Task-oriented principals negotiate an identity of nonparticipation in education, described as a peripheral trajectory. Lastly, idea-oriented principals participate in education with unaligned engagement. Their experience of working practice is one of struggle and conflict. Idea-oriented principals shift between being intensely engaged and non-engaged and negotiate an identity of ambivalent participation. This is described as a trajectory of marginality, where they either remain in a marginal position or leave the profession (Jerdborg, 2022). These three different orientations mean that the way principals perceive their role (and thereby take on work) affects their learning in the principal programme. Moreover, how the principals try to succeed and balance administrative management and leadership was dependent on their role interpretations.

### Developing Professional Experiences into Leadership Ability

Turning to the second thread, I will elaborate how the principals of this study develop professional experiences into leadership ability through intertwined engagement in training and practice. The results show how a principal requires capability and legitimacy to enact pedagogical leadership in close connection with the core processes of teaching and learning as well as negotiating new contributions in practice. Lack of both experience and competence with regard to school practice constrained enactment of pedagogical leadership. This obstructed a number of key features: leadership of the core processes of teaching and learning, providing prerequisites and organisation of teaching and learning, and relating results and qualities to student learning and school improvement (Jerdborg, submitted). These results consequently highlight how the degree of novelty in specified school practices (such as school forms, age ranges and subjects) affect how principals engage in their leadership practice. As this study demonstrates, taking responsibility for school practices that are unfamiliar to principals hinders their ability to lead and develop education, to understand historical traces of proven experience and to understand how results can be analysed and interpreted in relation to teaching. Moreover, a lack of knowledge results in not being given legitimacy, which in turn obstructs leadership ability (Jerdborg, submitted).

This means that if not sharing a repertoire of school practices with which to understand and develop practice, the principal's ability to engage and respond is unaligned because of the lack of this competence. Consequently, principals are

at risk of being marginalised in practice. Conversely, by sharing repertoires of practice it becomes clearly possible to renegotiate the meaning of various elements and develop practice together with teachers and in relation to teachers in schools. This complements previous findings (eg., Skott and Törnsén, 2018) by further develop and specify how the development of novice principals in education depends on quality and the amount of former experience. This study relates principals' pathway to practice of pedagogical leadership and educational participation, expanding earlier findings to include several dimensions of experience and learning in connection with pathways to demonstrate empirically how these interrelate. Moreover, providing analytical interpretations demonstrates the importance of being suitably equipped as a leader in relation to school forms and practices encompassed by leadership.

It was clear from the findings that the principals in the study not only have diverse identification with and orientation to the content and practice of the principal role but also take on different approaches to how to act as managers and leaders, either acting as brokers and becoming 'professional principals' or denying brokering and becoming 'commanders' (cf. Berg, 2018). Through brokering, content from the principal programme was woven into the principals' processes of learning (Jerdborg, 2021). This brokering also demonstrated how to bridge old and new practices within schools, rendering the principal legitimate in acting as a leader (Jerdborg, 2021). This also meant that the accumulation of shared histories of learning within organisations was detected in these schools, leading to collective understandings and a collective trajectory (Jerdborg, 2021). This finding connects with Murphy's (2020) argument that principal preparation and development needs to be seen as social practice situated in cultural contexts. Otherwise it could result in conflictual processes and a withdrawal from development and work. This was demonstrated in this study when principals acted through 'commanding' that occurred as understanding of principal program content was disconnected from principals' work in practice (Jerdborg, 2021, 2022).

By continuing learning processes, adjustments in practice are handled reflectively and modified to reflect context and bring value to the organisation. As being questioned, principals did rethink by externalising problems through talking and writing, thus finding 'the real problem' to act on. Thinking tools (in terms of reifications) helped their understanding and supported their agency to act (Jerdborg, 2021). Consequently, as different interpretations and approaches of principals' work and role meet within these processes of socialisation, situations for learning arise and changes in role interpretation showed to be possible due to feedback and experiences from practice (Jerdborg, 2021).

An important contribution that emerges is that when principals use boundary objects to help them negotiate a situated and collective understanding, negotiations of meaning improve because meaning becomes linked to the object (Jerdborg, 2021). In interrupted processes, meaning instead become linked to the principals' sense of self; furthermore, it possibly clashes with the organisational identification of professionals in school. Thus, being linked to identity positions becomes fixed and rather unnegotiable (Jerdborg, 2021). By unpacking such processes of social learning in schools, this study contributes by demonstrating the possibility of bridging a school's old and new practices by the principal acting as a broker. This study contributes by showing in detail how bridging applies in the context of principals' participation in education while working in practice, which expands knowledge on the professional development of principals. This is an important finding because schools need a coherent educational programme running through time (e.g., Jarl et al, 2017; Newman et al., 2001; Youngs & King, 2002) and a principal's acts of brokering show how bridging ruptures can be enabled in such a programme. Therefore, an important contribution of this thesis is the identification of principals' use of knowledge in close connection to schools' core processes of teaching and learning to enable responses to professionals in schools and the negotiation of new contributions to practice, that are connected to how principals act as brokers.

This study also shows that the principals need experiences of management and leadership to fully comprehend the content of education. A lack of experience in leadership practices limits the possibilities of making connections to practice; therefore, they must rely on reaching understanding retrospectively. That is, they do not yet have the competence to recognise and understand leadership practice as they do not share a leadership repertoire with which to engage and respond in relation to educational content and processes. This is an important finding that distinguishes novice principals from how experienced principals gain new insights and perspectives (cf. Aas & Blom, 2017).

Explicitly, this study shows that for principals who lack previous management and leadership experiences, analytical tools proved difficult to understand. This meant that some basic educational content passed them by (Jerdborg, 2021, 2022, submitted). They were, however, aware of the importance of perspectives and analytical tools in a general sense and of their own inability to understand and make use of them (Jerdborg 2021, 2022). As learning takes place in connection with social contexts and processes of which the individual is a part (Wenger, 1998), this can be understood as a contributing factor to a learning identity characterised by distancing and non-engagement (Jerdborg, 2022). They are yet not part of social contexts and processes of school leadership that enable them to identify and

connect with educational perspectives. By contrast, principals with school leadership experience already share a leadership repertoire with educators and literature promoting response and engagement; consequently, they easily follow a path to becoming full insiders.

To give a slightly more developed explanation, within the framework of the principal's programme, emphasis is placed on both analytical and process tools. The results of this study show that in learning processes, principals grapple with tools in the form of 'thinking tools', helping their understanding and supporting them to act (Jerdborg, 2021). Analytical tools support developed understandings while process tools support action in practice. However, analytical tools were serving participants who had previous experience of school leadership. Analytical tools in the form of perspectives (for example) proved to be an integral part of principals' new professional understanding (Jerdborg, 2021). These perspectives support principals to navigate and understand practice. Once incorporated, they can be understood as an integral part of professional identity. For this to take place, the participant must renegotiate identification in relation to the new perspectives and practice.

This requires that knowing is part of the principal's practice, both in terms of workplace practice and educational practice, as knowledge cannot be decontextualised (cf. Lave & Wenger, 1991). Thus, knowledge needs to be connected to the core of a principal's school. In all, this study shows that principals' learning can be understood as a process of identity formation over the boundary between education and practice leading either to resolutions or to struggles (Jerdborg, 2021). This accords with Murphy (2020), in that identity become entwined with steering and policy implementation.

The value of highly structured conversations in the connections between education and school practice have been highlighted by several studies (Aas & Blom, 2017; Aas & Vavik, 2015; Brandmo et al., 2021), and in some respects validates the findings of this study from the reactions and reflections from participants during and between interviews (as described in the methods section). Participants' reflections on coursework and actions in practice were described as being transformed through questions and reflections in interviews. However, in this study, participants passed under the radar in educational settings, resulting in unequal preconditions for being able to understand and make use of perspectives from education. These results imply that meta-reflection on identity formation needs to be included in principal programmes to promote learning (Aas et al., 2021; Jerdborg, 2021).

Further, in this study, task-oriented principals were shown to reject analytical tools in education, going directly to practice. This finding is in line with previous

studies, where linking programme resources with experiences does not happen automatically by programme participants; rather, they go directly from 'problem' to 'own solution' passing all forms of educational resources (Aas et al., 2016; Ärlestig, 2012). This approach can be considered problematic as it tends to result in principals getting into trouble as their actions rebound when managing and developing practice (Jerdborg, 2021, 2022). Process tools were proven to support action in practice (Jerdborg, 2021, 2022).

The results of this study underpin the argument formerly posed by Aas and Blom (2017) whereby participants need supportive structures and follow up that brings theoretical and practice perspectives together. However, this study also explicitly highlights the importance of experience to enable deep understanding to be developed by bridging analytical and practice perspectives. In this study, this issue was demonstrated by principals with a low degree of leadership or management experience using process tools merely in a technical way to attain compliance. Their lack of experience placed them in a difficult situation concerning educational expectations. To solve this, they created a bypass from which their experiences could later help to develop an understanding of analytical tools, which were understood as postponing expected learning. Their actions, consequently disconnected from in-depth understanding, led to unfortunate consequences in practice, which the principals found difficult to cope with because they lacked meaning to negotiate collectively within the school's organisation (Jerdborg, 2021, 2022).

Consequently, an important contribution of this thesis is that a lack of former experience of leadership complicates and obstructs learning and understanding of educational content in the Swedish National Principal Training Programme (Jerdborg, submitted). The importance of having some former experience of leadership while entering a principals' programme has been previously highlighted in the literature on principals in education (Aas & Vavik, 2015; Browne-Ferrigno, 2003; Skott & Törnsén, 2018). However, the findings of this study show that principals need a leadership repertoire to engage their understanding of educational content and analytical tools. Moreover, how principals engage in training is dependent on whether they have former peripheral school leadership experiences or not (Jerdborg, 2022, submitted). Principal's with no or little experience of school leadership were strongly represented among those oriented toward their own ideas or working tasks. By contrast, the organisational-oriented principals had former leadership experiences and engaged in negotiating meaning, shaping communities of practice and changing school practice, as they linked their programme participation and working practice (Jerdborg, 2022). As Groot (1965) concluded, what an experienced individual perceives will differ substantially from

that of an individual with little experience. As a result of experience, the perception of situations differs substantially and qualitatively; however, the experienced individual might not be aware of this since it is experienced as obvious knowledge.

Coming directly from teaching without experiences of leadership practices was shown overall to obstruct learning in the principal programme (Jerdborg, submitted). This can be explained by a lack of experiencing a leadership repertoire in social practice to share, develop and negotiate in education. This inhibits the formation of a personal learning trajectory in which personal development takes place (Lave & Wenger, 1991; Wenger, 1998). Consequently, experience is highlighted as an important, or even crucial source of learning that cannot be replaced by educational pedagogy alone.

It is evident that a natural lack of experience as a novice is understood. However, this study showed that the principal programme is not suited for novices; rather, the principal programme can be understood as directed toward [expert] principals aiming to develop professionally while excluding [novice] participants who are still on their journey to becoming a principal. That is, experienced [expert] participants are part of and can identify enterprises and repertoires that can be shared with educators and is made explicit in literature, thus developing their repertoires, redefining old ones, telling and retelling stories—while understanding and turning their enterprise and learning into practice (Wenger, 1998). Consequently, the structure of principal education becomes powerful for their social learning as they identify with a shared domain, committed to improving their respective practice and identify with a regime of competence that they recognise in principal education (cf. Wenger, 1998). However, novice participants cannot yet take part in this and consequently are moved into a marginalised position.

Overall, these findings imply that educators of principals need to map participants' experiences, professional identities, needs and orientations to a greater extent to be able to adapt training, give more support regarding enterprises and repertoires and challenge former understandings. Accordingly, the principal training programme could possibly benefit from being restructured to have fewer participants in groups and more frequent course meetings. This would mean that each participant has a fair chance of meeting with educators who can problematise, challenge and respond (e.g., Aas & Blom, 2017) to participants' orientations.

## Approaching the Role and Work of a Principal

With regard to the third thread, the results of this study show that, based on their learning in the principal programme, principals 'mirror' (cf. Aas & Blom, 2017) their schools and become sort of 'external reviewers' or 'state inspectors' (Jerdborg, 2021). This is an important contribution to our knowledge because it means that external congruence has come into focus due to novice principals' participation in the Swedish National Principal Training Programme. Formerly, principals in the Swedish context were found to be mainly internally congruent and supported prevailing patterns in schools, while external congruence in the form of creating a better match between their own school and the state's intentions has not been in focus, or at least not acted upon (Ekholm et al., 2000; Leo, 2010, 2015; Scherp, 1998). However, one former study of experienced principals suggested that mirroring was part of practice (Aas & Blom, 2017).

The results of this study demonstrate an important distinction between principals who understand and master the internal focus of their school and principals who do not. Principals who do not master the school's internal focus tend to fall to only external congruence, trying to guarantee students' rights through results follow-up conducted in a technical manner. In that role, they become merely external inspectors of their schools, showing similarities with the former state inspectors of *Folkskolan*. This is because these schools do not have someone who can take operational responsibility by leading from within. This is, principals are dismissing this because they lack shared repertoires, enterprises and mutual engagements. The results consequently show the importance of the principal taking a step into the school's core business and lead it 'from within' (cf. Ekholm et al., 2000) as it is not enough to stand on the outside as an external inspector.

Those principals who understand and master the internal focus of their school can take support from principal education and thus combine internal and external congruence as operations and results managers, acting as brokers. This renders them legitimate as a 'professional' leader (Berg, 2018; Jerdborg, 2021). However (at least in the Swedish context), a trend toward recruiting principals 'from outside' (i.e., from another school or school form) have been strong because principals who have been incorporated into their own school's teaching culture have previously been found to be less challenging (Ekholm et al., 2000; Scherp, 1998; Uljens et al., 2013). By contrast, the results of this study show that principals who are incorporated into the school's teaching culture understand the core of the specific school's problems better, and with support from external congruence from the principal programme they can challenge and lead the school's

development with a high degree of competence and legitimacy, while outside principals have a long way to go (Jerdborg, submitted).

This thesis consequently contributes by empirically showing the meaning of principals' leading 'from within' (Ekholm et al., 2000) in relation to the contemporary Swedish context. Overall, this indicates that specific experience and competence (in terms of understanding the school's practice) and recognising and making competent use of the practice repertoire while engaging and responding should be seen as one aspect of principals' legitimacy in today's Swedish compulsory schools, enabling experiences of meaning. The study further shows that task-oriented principals, taking the role of the 'first administrator', most often treat content and educational tasks merely as formalised rules and that the follow-up of results in practice are treated as such a rule. This shows that they are aligning to formal authority rather than linking results to school development or to the need for internal reorganising with a focus on leading processes linked to core processes of teaching and learning (Jerdborg, 2022). This could mean that their identity is closer to lending legitimacy from forms of legality (Leo, 2010). Regulations were recently identified as the most prominent aspect of a principal's professional dimension (Nordholm, 2021). This might be due to the prominence of content in the programme in combination with a lack of sufficient experience in their personal journey, resulting in a lack of competence concerning the school's practice or the practice of school leadership. However, based on the requirements of the position today and based on the needs of schools, this does not suffice. In other words, the principal's role is at stake, taking the role of an engaged broker with a theoretical grounding and with professional tools and perspectives to understand and develop practice, or by taking a more marginalised role (Jerdborg, 2021). Consequently, the findings of this thesis contribute to the knowledge on education for principals in terms of qualification and legitimacy through principal education by showing how aspects of qualification and legitimacy can be invoked from completely different perspectives, as forms of legality; rendering administrative leadership, or forms of competence; rendering pedagogical leadership.

In sum, these results show that several different interpretations of the principal's role and work in contemporary school run in parallel, making the leadership of the contemporary compulsory school differ widely. The organisational-oriented role interpretation is close to what Berg (2018) describes as the professional principal of today as an organisation builder. The other interpretations—task orientation and idea orientation—can be linked to historical roles in the form of 'first administrator' and 'operations manager' (cf. Berg, 2018). The tendency of the task-oriented principals to hold on to 'the invisible contract'

leaves teaching issues to the teachers, which is problematic, as previous research shows that principals and teachers need to meet for teaching to develop (e.g., Liljenberg, 2015b; Ärlestig, 2008). In addition, the need for teaching and learning to be premised on learning communities and professional development collectively are widely highlighted (e.g., Liljenberg 2015b; Spillane & Seashore Louis, 2002; Zepeda, 2015).

### Understanding Principals' Processes of Learning

Turning to the fourth thread means returning to the first research question: How can principals' process of learning and understanding be explained? Through the previous threads, this question has to some extent already been answered. By extension, the results show that leadership learning cannot be distinguished from understanding what is to be led or the context in which this occurs (Jerdborg, submitted). This means, school leaders' knowledge develops in relation to their previous area of knowledge and expertise (e.g., Darling-Hammond et al., 2010; Robinson, 2010; Stein & Nelson, 2003), and is social, reciprocal and contextualised and situated in cultural contexts (Hallinger & Heck, 2010; Murphy, 2020). It also means that the idea that principals should a) be independent of their former experience as a teacher in context and b) develop through participation in theoretical principal preparation programmes only (cf. Uljens et al., 2013) is contradicted by this study.

In this study, it is clear that those novice principals who take the step to being a principal are often deprived of their competence and legitimacy by applying to or being placed in a new context and school form where their former competence is not valid (Jerdborg, submitted). Thus, they do not share any repertoire, enterprise or mutual engagement with other professionals in schools. Thus, it appears that leadership is separated from what is to be led. Leadership is then emptied of content, decontextualised and connected to the individual (Jerdborg, submitted). The Swedish National Agency for Education, *Skolverket* (2015), states it is not possible to guarantee that principals with no teacher education will meet the qualification requirements for pedagogical insight. In this study, it was evident that even principals with both teacher education and solid teaching experience will be prey to concrete obstacles to the pedagogical leadership as they have tried to acquire principalship in school forms and stages that their education and experience have not included (Jerdborg, submitted). By contrast, while developing their school leadership in well-known school forms and age-spans, former knowledge and experiences facilitate their pedagogical leadership. That is, as the pressure on principals to manage results increases, the requirements for detailed

pedagogical knowledge to manage results, organise schools and develop core processes of teaching and learning also increase (Berg, 2018; Rapp et al., 2011).

Novices starting in well-known contexts are shown to have the capability and capacity to transform knowledge into leadership ability, trying things out and adjusting in practice. They also seem to have the capacity to try to learn specific but missing knowledge that they need in their working context. However, this also requires hard and conscious work to make the real shift from teachership to principalship (Jerdborg, submitted). The need for situated contextual knowledge and pedagogical knowledge of the practice to merge into leadership capability is therefore demonstrated. However, in the Swedish setting, principals may begin their principal's course taking responsibility for school practices they do not know because the requirement for pedagogical insight and experience is very general (Skolinspektionen, 2014a) and because of a previous coordinator approach (Ullman, 1997). All the same, the principal's responsibility for conducting pedagogical leadership with a focus on teaching and learning is continuously emphasised (Skolinspektionen, 2010, 2012, 2014b) as direct (Ståhlkrantz, 2019). Both directions—disconnection of principalship from knowledge in the core business, and simultaneous increased demands for leadership directly focused on teaching and learning—seems to be misplaced. However, this needs further exploration in relation to the principal role of results and operations manager and in relation to education as based on a scientific basis and proven experience.

In the new tender document, *Skolverket* (2020a) states explicitly that the principal's programme presupposes experience-based and process-oriented learning and that the studies in the programme are based on participants' professional experiences, which are to be extended through literature studies and lectures. This study shows that the professional experiences of school leadership gained by principals during their three years in internship and participation in the principals' programme do not suffice as a base for this kind of learning. On the contrary, the principals will need to bring more experiences from (peripheral) school leadership practice into their programme participation (cf. Thessin & Clayton, 2013). Another way of viewing professional experience would be to take care of former experiences (for example, as a teacher) to further develop these experiences into leadership ability. Thus, the principals' programme needs to change its approach.

In addition, the principals' learning can be understood to be a process of identity formation over the boundary between education and practice, in which they negotiate identities of participation and non-participation as active components of their respective engagement in practice (Jerdborg, 2021, 2022).

## Importance of Principal Training

Returning to the second research question: What is the importance of principal training in relation to the creation of a coherent school leader role for a contemporary school context? it is necessary to weave the four threads together. As described, the analysis in this study demonstrates that an organisational orientation was promoted in principal education, meaning that only the organisationally-oriented principals were able to participate fully and succeed in critically reflecting on their role and negotiating individual and organisational meaning in educational content (Jerdborg, 2022). However, only some principals were organisationally oriented, meaning that participants in their third and final year of internship and participation in the Swedish National Principal Training Programme still retain their task or idea orientation. This result cannot be viewed as an expected outcome because other studies show that participants' role conceptions develop during their time in education and internship (Aas & Blom, 2017; Aas & Vavik, 2015; Brandmo et al., 2021; Halvorsen et al., 2016; Perez et al., 2011). In this study, the results show that role conception can develop and change during internship but that many participants stick to an orientation that seems to obstruct their learning and development. Thus, it is important of paying attention to the participants' understanding of and orientation toward educational content and leadership practice, but also to enable and enhance meaning-making and engagement in training. This study shows that principal education does not create consistency in how participants view their role as principals in today's school or how they shape the work in the school's practice. On the contrary, the participants' capture different parts of educational content and understand educational content, putting it into practice in widely different ways (cf. Darling-Hammond et al., 2010; Skott & Törnsén, 2018). This could be because the principal cannot realise their professional identity in practice and thus cannot connect with everyday principal practice (Wenger, 1998).

Taken together, the results show that principals' processes of learning in the principal programme are intertwined with their work in practice (cf. Halvorsen et al., 2016). Moreover, these learning processes are thus not merely for the principal but affect the whole school (cf. Abrahamsen et al., 2015), either implicitly or explicitly. These findings can be understood as indirect interactions between the principal programme and the school organisation, mediated through the principal. Explicit work strengthens the principal's legitimacy within the school, while implicit connections do not (Jerdborg, 2021). In such interactions, it is important that the principal communicates a common focus where teachers are invited to take an active part in joint improvement work (Björkman, 2008;

Liljenberg, 2015b; Spillane, 2006; Youngs & King, 2002). Otherwise, instructions from the principal's programme presses principals and generates development efforts from a distance, indirectly controlling schools' internal work remotely and through a lack of contextual understanding. This means, an interaction between the principal programme and principals' schools might result in projects and assignments from education being only implicitly implemented as compliance, disconnected from the schools' joint work and thus experienced as a rupturing practice (Fry et al., 2005; Jerdborg, 2021; Piggot-Irvine, 2011).

This study demonstrates that either coherent or incoherent leadership practice does not always have to be about succession but is also an aspect of the leadership practice itself and how it is exercised. This study made clear that rupturing practice often happened as a result of denying joint work and a common focus when a principal tried to take on the approach as 'commander' (cf. Berg, 2018), while bridging happened as a result of working things through, making use of educational assets in terms of brokering and negotiating meaning (Jerdborg, 2021). Consequently, this study makes contribution by showing possible ways to succeed and proposes ways of acting as a leader in context. This is important as research is often criticised for only showing success but not how to develop. This study corroborates earlier findings that crises occur that can either provide opportunities for learning or lead to withdrawal and exits (e.g., Hubbard et al., 2006; Skott & Törnsén, 2018; Vennebo & Aas, 2020). This study examines such processes in detail and empirically shows how they play out in practice regarding novice principals. This is an interesting contribution because it might support the prevention of unnecessary withdrawals if considered in principal programmes. Thus, novice principals could be supported to become professional brokers and meaning negotiators rather than merely commanders (cf. Aas & Paulsen, 2019). Consequently, I agree with Vennebo and Aas (2020) and Abrahamsen and colleagues (2015) who suggest that there is a need for strengthening principals' skills in leading tension-laden change processes and contribute with empirical findings on which to reflect and learn from.

The novices in this study do not seem to reflect on the fact that they are 'incoming principals' and thus risk fragmenting their school's educational programme and weakening its capacity to develop (Heffernan, 2018; Jerdborg, 2021; Shirrell, 2016). These findings highlight a need for awareness of how new principals affect schools and their capacity to develop (Heffernan, 2018; Shirrell, 2016; Youngs & King, 2002). Principal programme organisers need to consider how to strengthen school capacity organisationally through principals' participation, and how the principal programme can support schools' development in a sincere sense (Aas et al., 2016). That is, if the principal programme is

to continue to intertwine principals' practices it needs to care not only for the participating principals but also their schools in one sense or another. This confirms the former questioning of the Swedish programme's disconnection from local levels of steering (Aas & Törnsén, 2016; Darling-Hammond et al., 2010). One conclusion is that if education for principals has a strong focus on the principal driving change in the school but ignores the specific school's history of improvement and professional community's need for involvement in a structured work of change running over time, the education will have a counterproductive effect on school development. This will render schools indecisive, turning back and forth between opposing directions but going nowhere. Moreover, if professional learning communities are to function as social resources of schools through which principals can affect students through the work of teachers, strong coherence over time regarding schools' pedagogical programmes (Spillane & Seashore Louis, 2002; Zepeda, 2015) needs to be acknowledged. If so, these can be further developed and renegotiated providing organisational learning and development supported by external congruence (Aas & Paulsen, 2019).

Overall, there is a need for critical examination of the structure of the principal programme. The leadership coursework is not proposed to be introduced until the final year of the course; however, several programme organisers have contested this structure by switching the order of coursework, or by splitting the leadership course into several units, intertwining leadership in other courses. Based on the results of this study, I would argue for the latter option, as leadership is not enacted separately but is always inherent in principals' work of taking the lead in certain contexts. Being new in a role and having little knowledge and overview of what the professional role entails can affect orientation toward one's work (Groot, 1965; Lave & Wenger, 1991; Perez et al., 2011). However, the findings of this study suggest that novice principals sometimes link their leadership actions too closely to their sense of self (Jerdborg, 2021). Understanding that is closely linked to identification might be hard to abandon or transform. Packer and Goicoechea (2000) point out that learning as identity development can not only be seen as adding knowledge but also as a demand that individuals let go of some of their old self to reshape their identity. This emphasises the importance of participants being given the opportunity to 'wrestle with' and free themselves from 'their old selves' in that they must adopt a new professional identity—and role conception—as a principal. Accordingly, emotional aspects involved in identity and role formation needs to be handled seriously (Aas & Vavik, 2015; Brandmo et al., 2021).

### Concluding the Discussion by ‘Zooming Out’

This study provides detailed insights concerning situated and local engagement by zooming in closely on practice. Zooming out and relating these insights to a global perspective on the ‘clones’, ‘drones’ and ‘dragons’ (Walker, 2015) of principal education (as referred to in the Previous Research chapter) makes political intentions visible in terms of imperatives and performative expressions in tender documents of principal education. However, there is a lack of contextualisation, resulting in privileging some research-based knowledge over other: for example, privileging the importance of instructional leadership while dismissing research regarding novice principals and what has been shown to promote their path into the profession in terms of leadership experience and sharing PCK with teachers. Thus, principal education is to have a special focus on pedagogical leadership and focus on a leadership promoting the quality of teaching (e.g., Browne-Ferrigno, 2003; Sinnema & Robinson, 2007; Skott & Törnsén, 2018; Spillane & Seashore Louis, 2002) while participants do not share any repertoire with the school professionals.

The Swedish National Principal Training Programme relies on shaping communities and groupings as part of participation. However, this study clearly demonstrates learning needs not only to connect communities, but communities of *practice* (cf. Aas & Blom, 2017). Indications of some existing community of practice formations was found within principal education in this study; however, these were not reified as formal groups but found each other informally, often linked from other settings. Indications of community of practice formations within schools were even more prominent (Jerdborg, 2021, 2022). These need not be seen as communities of practice by participants but do require a substantial degree of mutual engagement, negotiated enterprise and a repertoire of negotiable resources accumulated over time (Wenger, 1998). In educational settings, some repertoires tend to dominate while others are marginalised due to participants’ experiences and interests. In addition, an overall emphasis is placed on the school leadership repertoire, dominating at the expense of repertoires from school practices. However, as principals return to school, the opposite applies. This creates a divide between these repertoires instead of linkages. Here, principal training needs to be strengthened.

The new tender programme document states that the principal program should shed light on strategic and active leadership that is knowledge-based (Skolverket, 2020a); however, this study questions what knowledge this refers to: knowledge *about* state intentions trying to develop ‘independent educational leaders’ (cf. Uljens et al., 2013) but not educational leaders ‘dependent’

on knowledge and skills *in* school leadership and school practices? Based on the results of this study, I propose to shed light on strategic and active policymaking that is knowledge-based in terms of contextualising principals’ education in a national and historical context in the mirroring of international and national research on the role of the principal and novice principals’ processes of socialisation and learning by considering their path to principalship. This might mean educating principals in specific school forms and schools rather than educating just ‘principals’, or ‘principals of nothing’ working in anonymous contexts. Moreover, it means considering the development of educational infrastructures in total and not focusing on just this specific educational programme and its content.

This study demonstrates the situated nature of the principal’s programme; consequently, there is a risk that participants’ programme learning become decoupled from principals’ practice and vice versa. However, learning could be situated within participants learning trajectory; thus, connecting education and work would bridge programme and practice rather than being situated to specific processes in each place. Moreover, because learning as a situated activity takes place through legitimate peripheral participation (in terms of new practitioners participating in communities of experienced and practicing practitioners) there is also a risk of becoming decoupled from the school organisers in terms of municipalities and independent schools as well as from highly experienced professionals in schools. By gathering only novices and decoupling them from experienced leaders and other professionals in schools, from their own former experiences and former locations, there is a risk they might become all new; that is, new in all senses of professional lives and thus deprived of their competencies, their repertoires, enterprises and mutual engagements.

This study highlights the division between the high demands on the role of contemporary principals on the one hand and the weak opportunities to grow into the role and learn before one is expected to meet these requirements on the other hand (cf. Thessin & Clayton, 2013). Principals’ leadership ability has been found to be dependent on two dimensions of socialisation in previous research: professional and organisational (Crow, 2006; Heck, 2003; Leithwood et al., 1992). However, the results of this study imply that the changing demands on principals have shaped parallel tracks and that socialisation into the role of principal thus differs. Professional socialisation through participation in the principal programme does not overcome the parallel tracks due to former organisational socialisation. However, professional socialisation (in terms of education) is shown to enable further development for participants with former experiences of their school

practices, school leadership and for those with an organisational orientation to their role and work.

Based on the results of this study in relation to previous research, an extended contribution of this thesis is to observe that issues perceived as highly topical in today's schools—such as administrative overload, how to enact pedagogical leadership and questions on how to share these leadership duties among leaders—are not new (Ullman, 1997) but rather eternal issues that return from time to time. This implies that these are not solvable problems but rather are key aspects of principalship that continue to require attention.

However, in terms of learning the practices of school leadership, principals' loneliness stands out. In terms of how the principals' programme connects to their practice, there is a concern about where principals' learning in context takes place in terms of professional learning communities or communities of practice and in terms of school and 'district'? How does this loneliness affect their induction through education and what theory of learning and development underpins this setup in relation to research on school development and their leadership of collaborative organisations?

From the findings of this thesis, I would suggest that the collective work in schools is important and should be considered in terms of how the sum of knowledge of the school professionals are to benefit the students and society. Besides showing the importance of principals taking the lead in collaborative organisations, the collective work in schools in Sweden has formerly been discussed in terms of aspects of democracy and employee participation based on a Nordic tradition (Aas et al., 2021; Aas & Törnsén, 2016; Blossing, 2021; Blossing et al., 2014; Grimm, 2020; Liljenberg, 2015b; Møller, 2002; Uljens et al., 2013). Collaborative organisations and collective work continue to be essential if schools and students are to develop (Aas et al., 2021). Accordingly, teachers' and other professionals' specific knowledge must be considered to promote students learning and development, as no individual principal can have all the knowledge required for decisions to promote teaching and learning relying on scientific bases and proven experience (Abrahamsen et al., 2015; Robinson, 2010; Stein & Nelson, 2003).

#### *Summary of Contributions and Practical Implications*

The first paper shows that the orientation of novice principals toward work does not only affect their practice but also becomes a 'lens' through which the principal programme is perceived, shaping what becomes possible to learn. The paper presents an analytical tool in terms of a typology of learner identities, providing 'lenses' with which to access valuable insights into how programme content

can be perceived. The typology provides reference material for reflecting upon identity and the role of principal in educational settings.

Findings of the second paper show that novice principals' learning depends on having access to theoretical thinking-tools to understand and rethink practice by distancing, reflective thinking and questioning, and reifications to use as boundary objects. The paper also shows that principals need contextual knowledge about the school to connect educational content. Becoming a broker and engaging in situated negotiations in practice by linking meaning to boundary objects paves the way for the principal to act as a legitimate leader in practice. This contribution can form a foundation for leadership development and be used in development of principal programmes in terms of making qualitative distinctions between linking to objects or to self in negotiating change in schools. By extension, the paper showed how leadership incongruence (formerly identified as an aspect in unsuccessful schools) can be an aspect of leadership practice when neglecting the need for negotiating processes of change. Moreover, the second paper shows that participation in the Swedish National Principal Training Programme promotes external inspection in terms of 'mirroring'. The paper contributes to previous findings by showing that participation in the programme made principals aware of and engaged in shaping congruence to external demands. It also empirically demonstrates the importance of combining this with leading a school 'from within' in close connection with core practice and context, which requires careful consideration within educational contexts.

The third paper provides an empirical foundation demonstrate the importance of being suitably equipped as an educational leader in relation to school core practices in terms of shared repertoires of the school and school leadership. Specifically, this was demonstrated to apply to learning in the principal programme and enactment of pedagogical leadership in practice. The paper contributes by describing and deepening the understandings of how aspects interrelate in terms of preparation of principals in the Swedish setting in relation their path into principalship, showing in what ways competence and experience are important aspects of pedagogical leadership and professional learning.

By extension, the synthesis of the three papers contributes by showing that several different interpretations of the principal's role and work in the contemporary school are at play. Professional socialisation through participation in the principal programme does not overcome these parallel tracks due to former organisational socialisation. However, professional socialisation in terms of education enables further development for participants with former experiences of their school practices, school leadership and for those who take an organisational orientation to their role and work. Taken together, the results show

that principals' processes of learning in the principal programme are intertwined with principals' work in practice. Moreover, these learning processes are not merely a case for the principal but affect the whole school, either implicitly or explicitly. These findings can thus be understood as indirect interactions between the principal programme and the school organisation, mediated through the principal. Explicit work strengthens the principal's legitimacy within the school, while implicit connections do not.

These results imply that there are methodical factors to consider concerning principal education. First, participants' learning potential (individually and in groups) is not merely dependent on 'community' but on degrees of communities of *practice* in terms of shared repertoires in which group members can engage. This is already addressed in educational set-ups but can be more prominent in strengthening learning. Moreover, the learning climate as community affinity is shaped by mutual engagement in practice. Second, repertoires of school practices and school leadership need to connect and be engaged simultaneously. Third, educational content requires explicit connections with participants' leadership practices and school practices in terms of engaging and making use of educational repertoires to attain understanding and a higher form of reflection. Fourth, participants need to be challenged in terms of role conceptions, orientations and practices and gain structured support in terms of understanding and critical reflection. Fifth, novices need experienced educators and colleagues to engage in their communities and groups to focus practice.

However, participants experience educational arrangements and content differently. Explicit outcomes of this would need further exploration and is considered a limitation of this study.

### Further Practical Implications of the Study

Taken together, these contributions imply that orientation toward work and past, present and imagined possible professional identity needs to be addressed for explicit treatment and to be invited to engage in education. This is also true for the role of school leader, as it should be possible to relate as a critical review and to analyse the requirements of the role in practice and how it then should be designed and supported (cf. Aas & Blom, 2017; Aas & Vavik, 2015; Brandmo et al., 2021; Nordholm, 2021; Skott & Törnsén, 2018). Such meticulous work would need to be done by policymakers, school organisers, principals as a group and principal educators.

It may be the case that the role to which principals' education relates is not the same as the role interpretations that apply in municipal or independent school

organisers' organisations. Interpretations of the principal's role also need to be related to the school in today's society in terms of an organisation where principals and teachers might only work for short periods. Thus, the collective work for systematic development needs to be focused rather than the school's work being continuously reshaped based on individual principals' personal role interpretations. Consequently, this thesis repeats the proposal from the second paper; that is, the concepts of 'incoming principal' and 'programme coherence' are proposed to be adopted as part of such a focus (Jerdborg, 2021).

Opportunities for principals to work with pedagogical leadership in practice is closely connected to their competence and experience relative to teaching and learning in relation to the practices they are set to lead. This implies that the school organisers have a great responsibility in the appointment of new principals and in the follow-up of schools' work. Principals need to be careful to make clear within their schools on what grounds they should change direction and how the new direction relates to different forms of scientific and proven knowledge and previous direction. The importance of communicating, relating to knowledge, documenting and anchoring when it comes to processes of improvement cannot be overemphasised.

This study demonstrates how new principals and education for new principals can have a strong effect on schools. This entails a kind of responsibility for both principal education and school organisers. This shared responsibility seems difficult to handle in any other way than that principal education and school organisers need to collaborate and interact more closely than currently is the case. The new principals' 'effect' on schools needs to be followed up, challenged, adjusted and supported by the school organisers in collaboration with principal education.

The tender document of the principal programme states that through participation in the programme, principals should develop the ability to critically examine their practice (Skolverket, 2015, p. 2). As this study shows, the real novice principals cannot yet do this as they still are overwhelmed with understanding what a principal's practice consists of and gradually coming to master such practice. Consequently, the results draw specific attention to principal education being situated. That is, either situated in its location, or situated to the principals' respective experienced reality in terms of their personal professional history and their current school form operations—where they are located as social professionals—to be part of their personal professional learning trajectories. The second alternative is important, otherwise, principal education risk becoming irrelevant and not valued by participants and schools. It may also be the case that leadership experience is necessary to be able to carry out principal education in

a meaningful way. In this case, education cannot provide the solution but needs to be a responsibility for the state to set requirements for participation as well as for school organisers to create opportunities in practice to gain such experience. Thus, enhanced possibilities for gaining experiences of school leadership could possibly greatly benefit participants' learning processes and opportunities for in-depth learning.

The results of this study suggest that principal educators and those responsible for principal education need to critically examine parts of the educational structure and its implementation. One idea could be to couple leadership practice with education in other ways. Making training and peripheral leadership practice (without total responsibility) interact sequentially instead of intertwined would give novices time to gain leadership experience and repertoire to use while distancing and reflecting. Moreover, as school practices are made visible in the educational settings of principals, attention is needed to that the repertoires of leadership practices and schools' core activities might not be shared and thus unidentifiable by participants. The relationship between participants' previous experiences in working life and their degree of novelty when it comes to managing schools consequently need to be problematised and examined. The results of the study demonstrate that the principal education setup is aimed at principals with former leadership experience. This applies to tender document objectives and their implementation; however, this is in harsh contrast to political intentions as training is addressed to novices. Because many of the participants lack school leadership experience, they are left unsupported and go under the radar in large groups with sporadic course meetings where the individuals rarely meet an educator who can problematise, challenge or respond to participant's understanding. Instead, participants develop their understanding through other novices, whereby social hierarchies, in terms of positioning, arise between those with different learner identities. However, by connecting to participants' professional identities and schools' core processes in terms of former expert knowledge in practice, identities of participation might be invited, engaged and recognised as it is practice that sustains community.

### Methodological and Theoretical Contributions of the Study

In the research field of education for school leaders, there is a lack of theoretical and conceptual focus and a failure to connect theory with methodological considerations (Jensen, 2016; Lumby et al., 2008). Consequently, the methodological and theoretical contributions of this study are important to acknowledge and discuss, as is presented in the following section.

### *Methodological Contribution*

Addressing issues of how school leadership education affects the learning and undertakings of principals has been argued to be highly relevant but difficult (Caspersen et al., 2018; Forde, 2011; Hallinger & Heck, 1998; Jacobson & Bezzina, 2008; Taylor et al., 2009). Jensen (2016) notes the lack of research on development across working contexts, professions and positions, and moreover, reflecting the different working contexts, professions and positions in play when organising school leadership development. However, some studies of principals in education try to bridge contexts or professions (e.g., Skott & Törnsén, 2018) and used multiple methods—for example combining interviews and surveys or observational data (e.g., Darling-Hammond et al., 2010). However, these studies tend to study participants in one location, and by using interviews or surveys, only reflect on the other from a distance in terms of process and place.

This study contributes methodologically by using a consistent situated practice-based approach. This means continuously observing and interviewing principals at the specific sites where they are enrolled in education, getting to know their specific repertoires within their bonded systems, and interviewing them individually and in groups in direct connection and at direct site with their participation in the educational programme. This means reflecting on both process and place. Furthermore, following principals from these sites, shadowing and interviewing them at their specific work sites, and interviewing teachers within their organisation in schools, at work enabled a deeper understanding of the intertwining of principal programme participation and engagement in leadership practices in schools. This shows that researching leadership learning involves studying specific and situated practices. Thus, a consistent theoretical and methodological package is of great importance.

This combination of methodology and theory contributed to moving away from merely relying on the self-assessment of participants in school leader education, which has formerly been criticised (Darling-Hammond et al., 2007). This study presents nuanced and analytical views of aspects of principals' participation and engagement in education and work. The methodology of replication, multivocality and use of complementary methods of interviewing and observing in several situated social practices demonstrates a wide range of perspectives on the same social practice.

The conceptual framework enabled an analytical perspective to be applied to practice. As Jensen (2016) argues, the field of research on school leader education needs studies that can move the field forward, beyond what is possible through self-report alone. Moreover, Jensen (2016) concludes that the unit of analysis needs to be expanded beyond individual responses to obtain knowledge

such as patterns of interactions, social dynamics and learning processes in which many actors are participating. Accordingly, this thesis makes methodological contributions to the research field on school leader education by using a situated, rigorous and multivocal replication strategy in combination with practice theory when investigating principals' engagement in social practices. The study shows that by using practice as both a level of experience and analysis in three different principal programme settings and fourteen different schools, knowledge contribution on how principals develop individual and social identity across the border between educational practice and working practice was achieved (cf. Aas & Blom, 2017; Aas & Vavik, 2015). Consequently, using this combination of theory and methodology, enabled the study to determine how social practices—different but situated through their connection to a specific principal programme—represent the same social phenomenon in diverse settings. This indicates methodological power in using a situated replication strategy in relation to such a social learning theory, which enabled the detection of patterns.

#### *Theoretical Contribution*

It has been argued that the field of school leadership education has been under-theorised (Jensen, 2016; Lumby et al., 2008). Jensen (2016) highlights the need to focus on the situatedness of school leadership as 'how', while researchers need to engage in explaining aspects of situated undertakings, as well as to include tools and interaction with tools. This thesis makes important contributions to the research field by using a coherent theoretical and conceptual framework to analytically make sense of situatedness on the 'how' of development processes and on opportunities and obstacles inherent in interaction with tools (cf. Aas & Blom, 2017; Aas & Vavik, 2015). The thesis presents concrete and for the field, new ways to use analytical constructs from Wenger's (1998) social theory of learning to enable an understanding of development processes (Jerdborg, 2021, 2022, submitted).

In the first paper, the results show how some of the principals take an ambivalent approach to participation in the programme in terms of being partly intensively engaged and partly non-engaged (Jerdborg, 2022). Making analytical sense of this made clear that they were not fluctuating between an identity of participation and one of non-participation, but that their participation was one of staunch nonalignment with education. This finding shows that Wenger's (1998) 'social ecology of identity' (p. 190) can be further developed to not only include identities of participation and identities of non-participation but also those with ambivalent participation. Wenger (1998) outlines the subtle mix at play but does

not include a paragon of such a mix in the ecology. This study thus adds an empirical example of how such a mix of participation may appear in practice.

The second paper introduces a means of applying Wenger's (1998) conceptual framework to explore processes of development and change. Formerly, critiques of Wenger's theory argue that it is not suited to explaining processes of change. In addition, it scarcely addresses how artefacts sustain sociality (Nicolini, 2013). This paper combines forms of belonging to trace individual changes of identity-formation in reconciliation processes between education and work with dynamics in the form of continuity and discontinuity and tensions in dualities of local–global, participation–reification, emergent–designed and negotiability–identification to trace organisational processes of change. Furthermore, the analysis was extended from the situational and temporal to the historical, individual and collective histories by linking to a specific time and series of events (Des Chene, 1997). This extension made it possible to examine schools' and principals' processes of change and their interrelations from different points of views.

Individual processes of change in position were investigated by connecting modes of belonging (Wenger, 1998) to an analytic temporal logic (cf. Meulen, 1995). This made it possible to make analytical sense in relation to the flow of time within the identification dimension. What challenged and turned engagement were explored within the negotiability dimension. Wenger (1998, p. 183) proposes modes of belonging as a framework for understanding transformations over time as relations between engagement, alignment and imagination are not fixed over time. The analytic temporal logic assisted in carving out such a framework. This approach to framing social practice revealed knowledge on how principals develop individual and social forms of identity in interaction between individual–social and contextual aspects between education and work, and how the outcome of this was dependent on their use or non-use of tools.

The third paper proposed a focus on enabling tensions in practice between forms of experience and competence and principal's learning as changes in alignment between experience and competence using the conceptual framework of Wenger (1998). This was shown to be a fruitful way of approaching challenges for the principals in their social practice as they conducted pedagogical leadership. Trying out these constructs in practice makes both a theoretical and analytical contribution to the research field and makes an empirical contribution to the social theory of learning. The findings of the third paper supported the contribution to the research fields of education for principals, principals in education and principals' professional development. Wenger's (1998) framework assisted in discerning learning in any social setting, group or 'community' (traditional terminology) from learning in communities of practice. This means setting

the focus on practice rather than community; that is, a practice recognised by participants in terms of having a shared repertoire, such that a joint enterprise toward their mutual engagement can be directed. This is crucial in terms of learning through changes in alignment, because no enabling tensions between competence and experience occurred when participants—or principal and teachers—lacked a shared repertoire or joint enterprise to develop. Thus, principals' disengagement and non-participation became an active component of their pedagogical leadership practices.

Formerly, work in learning groups has been put forward as an important component within educations for principals; however, only some participants seemed to keep to these groups (Crawford & Cowie, 2012; Skott & Törnén, 2018) which created uncertainty in terms of how to make analytical sense of the issue. Aas and Blom (2017) focused on practice as the core issue in learning for principals. This study made an additional contribution by specifying how the principal's former experience brought specific competence in terms of a practice repertoire by which to understand practice while engaging and responding. Moreover, a lack of repertoires obstructed learning in programme and practice; this is, a repertoire of educational leadership to promote learning in the programme and a repertoire linked to school form, student ages and subjects to promote learning in practice (cf. Pont et al., 2009).

Using Wenger's (1998) theory also provides a theoretical contribution to research on the professional identity formation of principals in education and practice. Learning and identification regarding the professional identity of principals have formerly been found to be a crucial part of principals' professional development (e.g., Møller, 2012; Nordholm, 2021; Skott & Törnén, 2018). This thesis provides an example of using a coherent and consistent theoretical and analytical framework while exploring the professional identity of principals (e.g., Crow et al., 2017).

Overall, this thesis presents an extended empirical basis for Wenger's (1998) conceptual framework. Moreover, a further contribution is made in trying out the framework on education for principals and principals in education, which contributes to further development of the theory in the research field. However, the theoretical grounding primarily and importantly contributes to the research field on principals in education and practice.

#### *Theoretical Implications*

These results show that issues (perceived as highly topical in today's schools), are not new but rather are eternal issues that re-emerge and are underpinned by the theoretical premises of this study where identities are viewed as historical

as forms of participation and reification intertwined over time. This means that (as in this case) they interact through meeting again to be renegotiated. Both individuals and collectives are thus connected to history by dual processes of remembering and forgetting and through experiences of participation through generations (Wenger, 1998). Thus, history and present time interact through these challenges inherent in principals' work; however, in practice they are contested and renegotiated and taken care of within the frame of prevailing time. Consequently, history and the present time do not fuse.

The analytical concepts of engagement, alignment and imagination were used in this study and were shown (by being part of principals' identification) to be the main aspects that relate to and help to explain principal's approach to both education and practice. Reflecting on the findings, I find it important to highlight that Wenger argues for a change of the original conception of 'modes of belonging' to 'mode of identification' (Wenger-Trayner & Wenger-Trayner, 2015 p. 28). Consequently, I find the change into 'mode of identification' as highly relevant as it names the analytical concepts in accordance with what they describe in line with the practice perspective. That is, as the results demonstrate, the diverse orientations of principals found in this study are all about identification with the professional role, which says nothing about the activities the principal leads.

Thus, a task-oriented principal does not have more or different tasks than other principals. The ideas of an idea-oriented principal are not very different from the universal pedagogical orientations that usually exist in schools and the organisation-oriented principals' schools are not in themselves more organised than others (Jerdborg, 2022). It is having a task, an idea or the organisation of the school as their main train of thought and what this entails that separates them. In practice, this means that when the principals receive an assignment to implement and reflect on in their practice, the task-oriented principals will find time to perform the task, the idea-oriented principals will determine whether their own idea is sufficiently visible in the school, while the organisation-oriented principal will make considerations based on how the educational assignment may affect their organisation, what may result, and how this can best be achieved. Even if these orientations represent ideal types and do not correspond in full to participants *per se*, they do help to understand the learning processes.

Overall, applying Wenger's (1998) theoretical framework in the analysis required trying a set of theoretical constructs empirically in the environments and practices of principals. My estimate is that this was a worthwhile endeavour as it helped to make analytical sense of principals' practices and their sensemaking as individuals and as social actors. It also helped to enhance the analytical clarity of the constructs in the research field of principals in education.

## Chapter 8 Conclusion

This section concludes this thesis by briefly repeating and underlining its main contributions to existing knowledge and responding to the purpose of the study. Limitations of the study are highlighted and suggestions for further research made.

### Learning Principalship in a Swedish Context

Although the question of what sort of education principals need to succeed as leaders in schools has been central for some time, research on how principal education affects the learning and activities of principals has been scarce. Addressing these issues has also been considered difficult because of complex relations between leadership development and leadership practice in schools. However, education for principals is presented as a solution to all sorts of problems in schools. By introducing a situated practice-based approach to principals in education and work, this thesis makes contributions to our knowledge on these issues. The aim of the thesis was to explore novice principals' learning and their understanding of principalship in a Swedish context as principals are socialised into the role through education and practice. The study makes contributions on principals' work and role, education for principals and principals in education.

Primarily, this thesis contributes to the knowledge on principals in education. First, by confirming previous findings that a lack of experience hinders learning on how to lead a school, that field-based work in connection with principal education can either support or disengage learning and that combining theory and practice should not be left to the participants to handle entirely by themselves. Thus, this thesis strengthens the empirical foundation for these conclusions. Second, by approaching learning and experience, this thesis adds several important components to our knowledge on principals in education: 1) that understanding of leadership can be closely attached to identity and does not either easily or naturally develop over time; 2) by discerning how former experiences affect the intertwined learning in programme and practice; 3) by showing how intertwined learning and non-learning affects the whole school; and 4) highlighting the importance of principals mastery of the internal focus of a school using a shared repertoire. This thesis highlights the Swedish context, in which

novice principals are often deprived of their competence and legitimacy as they are expected to develop leadership ability, because they are disconnected from their professional experience—experience that this study highlights as crucial. For the individual principal, this might be a transient problem as they gain new experiences and potentially come to master new repertoires over time. However, for teachers and students in schools who seems to ‘subscribe’ to novice principals following one after another, this is a major issue affecting schools strongly and for the long term.

Overall, this contributes to our knowledge on the learning and understanding of principalship in a Swedish context in terms of how principals are socialised into the role through education and practice. Based on the results, this thesis claims that changing demands on principals have also changed the base for professional and organisational socialisation.

### Study Limitations and Suggestions for Further Research

This study focused on novice principals in education and work, which limits what conclusions can be drawn. Experienced principals’ ways of approaching leadership in relation to questions about teaching and learning are not investigated in this study. More knowledge is needed about experienced principals’ opportunities and limitations regarding how to further develop core pedagogical knowledge and leadership skills (cf. Aas & Blom, 2017). Moreover, the theoretical and conceptual framework and perspective chosen for this study made important understandings possible concerning learning, meaning and identity. However, this perspective and framework are not all encompassing. Other perspectives could open up other questions for further study, and this is also true for the methodological approach applied. As already mentioned, concerning the Swedish case, the two directions of a) disconnection of the principalship from knowledge in the core business and b) simultaneously increased demands for leadership directly focused on teaching and learning require further exploration in relation to the principal role of results and operations manager and the education being based on a scientific bases and proven experience.

Further knowledge is also needed about what understandings of the role and work of the principal the school organisers consider and would implicitly and explicitly support. Regarding education for principals, the same applies, as the conclusions of this study only cover novice principals. Further education for experienced principals would gain from enhanced exploration.

Regarding schools in general, more knowledge would be needed about the different forms of knowledge that support the basis for organisational

decisions made in schools and which groups of professionals can contribute knowledge to make well-founded decisions in relation to the direction of the school. In addition, scientific knowledge and proven experience on the premise for hiring and supporting novice principals to shape a school would be of value. Moreover, knowledge about how schools can be systematically developed over time despite changes of teachers and principals would also support school development.

However, this study most importantly contributes to research on principals in education. Given these contributions, answering some further questions would advance our understanding and knowledge of the learning of principalship and facilitate the opening of ‘the black box of principal education’. This would be the case regarding questions of how and why various training elements are experienced differently from various participants’ perspectives. One example would be the use of learning in groups, which were experienced very differently by participants in this study. Under what circumstances and for whom does work in groups facilitate learning, and under what circumstances and for whom is work in groups perceived as an obstacle for learning? Another important issue to further examine is what is required of a principal in terms of being able to critically self-analyse in relation to work, draw conclusions, and change their leadership accordingly (cf. Aas & Blom, 2017; Aas & Vavik, 2015).

One question about principals’ agency evoked by the results of this study is who and how these can benefit from previous experiences and build on these in education. In terms of why—what do they gain and what drives diverse approaches to leadership? How would principals’ learning in education be supported by a close collaboration between organisers of principal education and school organisers is an area that would also be of great value. Methodologically, principals in their social practice could be explored in more detail, preferably in coherent frameworks with theory to enhance analytical clarity.

## Swedish Summary

Den här avhandlingen behandlar viktiga och aktuella frågor om rektorers lärande och förståelse av sin rektorsroll när de socialiseras in i rektorsrollen genom utbildning och arbete. Skolledarens betydelsefulla roll för en skola och för elevers lärande och utveckling framhålls ofta i samhällsdebatt och forskning. Inte minst har det globala intresset för att jämföra skolors prestationer och elevers resultat satt ljus på betydelsen av rektorers arbete. Intresset för rektorer har förstärkts av utredningar som visar att rektorer inte alltid leder skolor så att elevers utveckling och lärande främjas. Därmed har frågan om vilken utbildning rektorer behöver för att kunna hantera skolors vikande resultat blivit central.

Rektorsutbildning har funnits under förhållandevis lång tid i Sverige. Sedan 1976 har en statlig rektorsutbildning erbjudits även om den inte nått alla rektorer. Från och med år 2010 är dock den statliga befattningsutbildningen Rektorsprogrammet obligatorisk för alla nytillträdde rektorer i läroplansstyrda verksamheter. Det gör Sverige särskilt intressant att undersöka. Den treåriga befattningsutbildningen genomförs parallellt med rektorsarbetet och ska slutföras inom rektorns första fyra år i tjänst.

Den här avhandlingsstudien syftar till att utforska lärande och förståelse av rektorskap i en svensk kontext när rektorer socialiseras in i rollen genom utbildning och arbete. Forskningsfrågorna som ställs är: 1) Hur engagerar sig rektorer i rektorsutbildning i samspel med sin professionella yrkesutövning och hur kan rektorers läroprocesser förklaras? 2) Vilken betydelse har rektorsutbildning för formering av en sammanhållen skolledarroll i den samtida skolan? Syftet och forskningsfrågorna besvaras genom en undersökning av rektorer verksamma i den svenska grundskolan vilka deltar i sitt tredje och sista år i det obligatoriska Rektorsprogrammet.

Sverige har en komplicerad styrmodell för skolan där ansvaret för elevernas utbildning delas mellan staten, utbildningsanordnarna i form av kommuner och fristående huvudmän samt rektorer och lärare. Rektor är emellertid den som enligt författningarna har specifikt ansvar för att leda och utveckla utbildningen vid den egna skolenheten genom det pedagogiska arbetet som genomförs i samverkan med lärare och övriga medarbetare. Uppfattningen att rektorer behöver utbildning för sitt uppdrag har stärkts över tid. Det beror delvis på att novisa rektorer visat sig vara oförberedda för rektorsarbetet, men också på generellt ökade och förändrade krav på rektorers arbete. Förväntningar ställs

därför på att rektorsutbildning ska stödja rektorer att ta sig an rektorsuppdraget. Det empiriska stödet för om och hur rektorsutbildning fungerar stödjande för rektorerers arbete är dock alltför svagt eftersom forskningens omfattning är begränsad. Detsamma gäller forskning om novisa rektorer och deras väg in i yrket.

Vad det innebär att vara skicklig som rektor har visat sig vara beroende av tid och kontext. Under senare decennier har rektors arbete alltmer gått mot ett kombinerat verksamhets- och resultatansvar. Vilka konsekvenser den här omstruktureringen har lett till för rektorer och skolor är ännu inte helt klarlagt. Efter hand har dock forskning visat att den kontext i vilken rektorn arbetar spelar en avgörande roll för arbetet och den professionella utvecklingen. Hur rektor och lärare samverkar och kommunicerar i vardagsarbetet liksom att rektor delar specifik pedagogisk kunskap med lärare har visat sig vara av största vikt för att utveckling av undervisningen ska komma till stånd. I Sverige har det under lång tid diskuterats hur rektor ska balansera mellan den mer administrativa delen av rektorsuppdraget och ett pedagogiskt ledarskap inriktat mot undervisning och lärande.

Historiskt sett har akademisk utbildning ansetts utgöra anställningsgrund för en rektor. I Sverige var doktorsexamen ett kvalifikationskrav för rektorer i Läroverk fram till 1953. I Folkskolan däremot saknade de seminarieutbildade lärarna akademisk grad. Statliga inspektörer granskade i stället arbetets inriktning i Folkskolorna. När Folkskolans huvudlärare, så kallade förstelärare, fick ett utökat ledningsansvar krävde de utbildning i utbildningsadministration. Därmed synliggjordes en skiljelinje mellan två uppfattningar som fortsatt gör sig gällande, nämligen huruvida rektorer har ett akademiskt grundat uppdrag eller om det ska vara en administrativt inriktad befattning. Diskussionen om akademisk utbildning eller befattningsutbildning har lett till en kompromiss som innebär att Rektorsprogrammet anordnas av universitet och ger 30 högskolepoäng på avancerad nivå, dock inte inom ordinarie utbildningsuppdrag utan som ett specifikt uppdrag utifrån ett måldokument från Skolverket.

I ett internationellt perspektiv har forskning om rektorsutbildning pågått sedan 1950-talet och det finns en hel del kunskap om likheter och skillnader mellan rektorsutbildningar världen över. Forskning om rektorsutbildning i olika länder är viktig eftersom rektorerers lärande har visat sig vara starkt knutet till de specifika kontexter där rektorer arbetar. Trots det visar flera studier att länder runt om i världen tenderar att kopiera rektorsutbildningars design, innehåll och upplägg utan att göra kontextspecifika anpassningar. Utbildningar för rektorer är generellt sett utformade för att förbereda rektorer att kunna svara upp mot de krav och förväntningar som samhället har på skolor. Regleringar av skolväsendet och av rektorerers arbete ser olika ut i olika länder och därför kan utbildningar för

rektorer skilja sig åt. I Europa erbjuder en majoritet av länderna någon form av skolledarutbildning. Variationen av upplägg, innehåll och inriktning är stor. I de flesta europeiska länder är rektorsutbildning inte obligatorisk och når därför endast en del av rektorskåren.

Forskningen om rektorsutbildningar fokuserade inledningsvis rektorerers självupplevda nöjdhet. Med tiden vidgades fokus till att även inkludera hur lärprocesser var utformade inom ramen för utbildningarnas design. Det visade sig då att ett deltagarcentrerat lärande är viktigt. Samtidigt framkom det att deltagarna uppfattade innehållet på olika vis och också utövade sitt ledarskap olika. Forskare började då att intressera sig för deltagandet i utbildning utifrån nya perspektiv och med hjälp av andra metoder. Deltagares tidigare arbetslivserfarenheter visade sig sedermera vara den enskilt viktigaste faktorn för möjligheterna att lära i en rektorsutbildning. En annan faktor som i ett internationellt perspektiv visat sig vara avgörande är att rektorsutbildning ges i nära samverkan med rektorns huvudmannasammanhang. Det innebär att rektor, rektorsutbildning och huvudman samverkar kring en gemensam inriktning som står i samklang med rektorns specifika skolverksamhet. I den svenska kontexten är forskning om rektorer i utbildning ännu begränsad. Enstaka studier har visat att deltagares tidigare yrkeserfarenheter har betydelse för det lärande som kommer till stånd i Rektorsprogrammet. Det finns emellertid behov av utförligare kunskap om på vilka vis lärande i rektorsutbildning och rektorsarbete sker och vad det betyder för rektorer och skolor i vardagsarbetet.

I den här studien används praktikteoretiska utgångspunkter och ett teoretiskt och analytiskt ramverk i form av Wengers (1998) sociala lärandeteori. Den tar sin utgångspunkt i situerat lärande i form av legitimt perifert deltagande, vilket innebär att det är individens lärande i den specifika situationen med andra som fokuseras. Personlig och professionell utveckling sker när individen antar olika perspektiv och därigenom förvärvar nya erfarenheter. Deltagande och erfarenheter skapar en lär-bana vilket över tid bidrar till en förändrad identitet. Inom den sociala lärandeteorin betraktas praktik som handling i en specifik historisk och social kontext. Handling inom ramen för ett specifikt sammanhang ger struktur och mening till handlandet. Att bli del av en praktik innebär att lära sig agera, tala, känna och förstå vad saker betyder i just det sammanhanget. Efter hand tillägnar sig deltagare i en praktik på så sätt en delad repertoar av handlingsmönster, yrkesspråk och redskap. Att engagera sig i en praktik skapar både en delad repertoar och praktikgemenskap. Praktikgemenskap är inte vilken slags samhörighet som helst, utan praktikgemenskap bildas genom ömsesidigt engagemang i en gemensam verksamhet inom en specifik praktik. En sådan

praktikgemenskap kan hållbar, men också skapa och utveckla ny kunskap och kompetens.

För att studera rektorers lärprocesser i komplexa sammanhang av utbildning och arbete har jag utformat en kvalitativ forskningsdesign. Tre studiegrupper vid varsitt lärosäte har följts genom observationer under sitt tredje och sista år av utbildningen inom det obligatoriska Rektorsprogrammet. Fjorton rektorer har också deltagit i individuella och gruppvisa intervjuer i anslutning till utbildningens träffar. Dessa rektorer har också intervjuats och skuggats i sin vardagliga yrkesmässiga kontext i sin skola. Därtill har lärare eller andra anställda i rektorernas närhet deltagit i intervjuer om skolans arbete. Urvalet av rektorer har skett inom ramen för de tre kursgrupperna och avser att i möjligaste mån avspeglar sammansättningen av svenska grundskolerektorer avseende kön, ansvar för olika årskurser samt kommunal respektive fristående skolhuvudman.

### Artikel I

I avhandlingens första artikel, *Educating school leaders: engaging in diverse orientations to leadership practice*, undersöks rektorernas deltagande i utbildningen inom Rektorsprogrammet. Deltagandet undersöks i relation till det vardagliga rektorsarbetet i skolorna. Utifrån studiens empiri identifieras tre olika lärandeidentiteter i betydelsen att rektorerna deltar i utbildningen och skapar mening och förståelse för deltagandet på distinkt olika vis. Lärandeidentiteterna framträder utifrån rektorernas orientering till sitt arbete och benämns som: organisatoriskt orienterad, uppgiftsorienterad och idéorienterad. Den orientering rektorn har till arbetet visar sig vara avgörande för hur rektorn kommer att delta i utbildningen, hur rektorn förstår utbildningen och vad rektorn får med sig av utbildningens innehåll. Orienteringen påverkar också vilka erfarenheter rektorn skapar i sin yrkespraktik.

De *organisatoriskt orienterade rektorerna* är inriktade på att leda professionella organisationer inom vilka de koordinerar olika perspektiv och praktiker. Inom ramen för Rektorsprogrammet engagerar sig rektorerna i att skapa förståelse för utbildningens innehåll, perspektiv och redskap, vilka de också tar med sig till sitt rektorsarbete. I rektorspraktiken används utbildningens innehåll för att förstå praktiken på nya sätt, en förståelse som rektorerna många gånger delger och bearbetar tillsammans med lärarna på skolan. De *uppgiftsorienterade rektorerna* fokuserar i stället på att ta sig an den nya rollen som rektor genom att lära sig att hantera yrkets många olika arbetsuppgifter. I Rektorsprogrammet försöker de koppla utbildningens innehåll till dessa arbetsuppgifter, vilket gör att det blir svårt att skapa mening och få förståelse för innehåll och perspektiv. De uppgiftsorienterade rektorerna upplever därmed utbildningen som teoretisk och abstrakt. Redskap i form av modeller, perspektiv och begrepp skapar hinder

för de uppgiftsorienterade rektorerna i relation till lärandet. Detta hanteras genom att rektorerna distanserar sig från utbildningen och förskjuter meningsskapandet framåt i tiden. Deltagandet får på så sätt en perifer karaktär. Det medför svårigheter att använda sig av utbildningens innehåll i yrkespraktiken, vilket leder till att utbildning och rektorspraktik blir två avgränsade praktiker. Uppgifter från Rektorsprogrammet genomförs på ett tekniskt sätt av de uppgiftsorienterade rektorerna. *Idéorienterade rektorer* har fokus på implementering av specifika pedagogiska idéer i sin rektorspraktik. I Rektorsprogrammet sorterar de utbildningens innehåll utifrån vad som kan hjälpa dem att få igenom sina idéer vilket snävar in utbildningens omfång. Det medför också att de växlar mellan engagemang och distansering i utbildningssammanhanget. Det gör att deltagandet får en ambivalent karaktär för de idéorienterade rektorerna. Till rektorspraktiken tar de med sig argument och innehåll från utbildningen. Det får dem att hävda sitt specifika perspektiv på ett sätt som ofta leder till konflikter i skolans verksamhet.

Resultaten visar att hur rektorerna uppfattar och tar sig an rektorsyrket påverkar vad de får med sig för innehåll och perspektiv genom befattningsutbildningen. Vidare visar resultaten att det i nästa steg påverkar deras skolor. Eftersom rektorerna tar sig an yrket på olika vis får de också olika lärandeidentiteter i utbildningssammanhanget. Genom att de *organisatoriskt orienterade rektorerna* skapar en engagerad lärandeidentitet av fullt deltagande i utbildningssammanhanget antar de en tryggt invallad lärbara till att bli fullt initierade yrkesutövare. De *uppgiftsorienterade rektorerna*, vilka skapar en distanserad lärandeidentitet av icke fullt ut deltagande i utbildningssammanhanget, antar en perifer lärbara. De *idéorienterade rektorerna*, vilka skapar en växelvis engagerad och distanserad lärandeidentitet av ambivalent deltagande, antar en marginaliserad lärbara. De tre orienteringarna och lärbanorna bildar tillsammans en typologi som kan användas som ett analytiskt redskap för att förstå lärprocesser. Varje orientering motsvarar då en så kallad idealtyp.

Jag drar slutsatsen att den lärande- och yrkesidentitet som rektorerna skapar under sin tid som noviser formas i interaktion mellan rektorsutbildning och rektorspraktik. Hur rektorerna kommer att förstå utbildningen och förmår engagera sig i dess innehåll bidrar till att påverka såväl formeringen av yrkesidentiteten som förståelsen av rektorspraktiken och vilka erfarenheter som skapas i densamma. Rektorerna i studien kommer ut ur Rektorsprogrammet med olika sätt att se på och ta sig an yrket. Hur de kommer att förstå utbildningen är beroende av den orientering gentemot rektorsyrket som de initialt har. Artikeln visar på så sätt att det är av avgörande betydelse att inte bara se till befattningsutbildningens innehåll och inriktning samt utbildarnas kompetens utan att också se till deltagarna och deras förståelse av och orientering mot yrket.

Att fokusera deltagarna i en utbildning i syfte att kunna stödja deras utveckling till ett fullt engagemang i och djup förståelse för utbildningens innehåll kan följaktligen innebära att som utbildare närma sig utbildningsinnehållet utifrån olika orienteringar gentemot rektorsyrket.

### Artikel II

I den andra artikeln, *Participation in the Swedish national principal training programme: How does it intertwine with principals' practice?* studerar jag hur rektorernas deltagande i Rektorsprogrammet sammanflätas med deras yrkespraktik med specifikt fokus på hur rektorernas lärande i yrkespraktiken kan beskrivas och förstås i relation till rektorsrollen. Analysen visar att rektorernas medvetenhet om de samhälleliga krav som ställs på skolor ökar genom deltagande i Rektorsprogrammet. Vidare visar resultaten att rektorerna speglar sina verksamheter gentemot dessa insikter och vid behov påbörjar anpassningar av verksamheten.

När ett förbättringsarbete initieras i en skola visar analysen hur två olika processer kan skapas: *processer av kontinuerligt lärande* alternativt *processer där möjlighet till lärande avbryts*. När rektorerna knyter an sin verksamhet till den förståelse som skapas i och med deltagande i Rektorsprogrammet och justerar sina handlingar i praktiken utifrån praktikens behov främjas processer av kontinuerligt lärande. Resultaten visar hur rektorerna hanterar förbättringsarbete reflexivt och meningsförhandlar förändringar med lärarna genom att knyta an förändringar till skolans historiska och aktuella kontext. På så vis överbryggas brister i den kollektiva förståelsen av verksamheten samtidigt som rektorns legitimitet ökar. Nya perspektiv och förbättringsarbete knyts på så sätt samman med verksamhetens historia och behov.

Processer där lärande avbryts skapas när rektorn introducerar och genomför justeringar eller förbättringsarbete i verksamheten utan att ta hänsyn till skolans historia och behov. Varken behovet av förbättring eller rektorns initierade 'lösning' meningsförhandlas med lärarna. När lärarna vill förstå förbättringsarbetet och efterfrågar information och dialog, ges inte utrymme för det, vilket leder till förvirring i verksamheten. Rektorns legitimitet sjunker och konflikter kan uppstå. I stället för att meningsförhandla avbryter rektorerna processer som potentiellt skulle ha kunnat leda till lärande för hela organisationen. Processerna avbryts exempelvis genom att rektorn ändrar gruppansättningar eller byter förbättringsfokus. Resultaten visar att rektorerna genom att avbryta processer avvisar redskap från utbildningen som hade kunnat användas för meningsförhandling. Rektorerna avvisar redskapen eftersom de menar att de är abstrakta, teoretiska och svåra att förstå. I stället hävdar rektorerna att de lär sig yrket i praktiken. Genom att besluta och agera direkt menar de sig visa handlingskraft som ledare. Analysen

visar dock att avsaknaden av meningsförhandling medför att förbättringsarbetet i stället kommer att knytas till rektorn som person och att meningspositionerna därmed blir låsta. Det leder till att samtalen kommer att handla om att vara för eller emot rektorn snarare än att handla om vilka justeringar som verksamheten behöver för att kunna utvecklas. Några rektorer låter emellertid förbättringsåtgärderna bidra till att gemensamma erfarenheter skapas, men på ett sätt som förskjuter möjligheterna till meningsförhandling framåt i tiden, tills gemensamma erfarenheter finns. Rektorerna tar hjälp av redskap från utbildningen för att förhandla mening förmår däremot förändra sin roll till en meningsmäklare med legitimitet.

Artikeln visar att rektors arbete utövas i ett specifikt kontextuellt sammanhang tillsammans med lärare till vilka en ömsesidig relation behöver utvecklas. Resultaten visar också att anpassning av verksamheter till externa krav kräver kunskap om och förståelse av den lokala skolans kontext och historia eftersom utifrån kommande krav behöver meningsförhandlas med de lokala deltagarna, det vill säga lärarna. Först då kan förbättring som upplevs legitim och förankrad komma till stånd. I sådana processer visar sig rektorsrollen stå på spel på så vis att rektorn antingen kan ta rollen som engagerad meningsmäklare med teoretisk förankring och professionella redskap och perspektiv med vilka praktiken kan förstås och utvecklas, alternativt ta en betydligt mer marginaliserad roll med bristande legitimitet.

Artikeln visar således att en sammanhängande alternativt osammanhängande ledningspraktik i en skolverksamhet inte alltid behöver handla om täta rektorsbyten utan också är en aspekt av ledningspraktiken i sig och hur den utövas. Därtill visar resultaten att förbättringsarbete i skolor involverar såväl sociala som kulturella aspekter och att formering av yrkesidentitet flätas samman med såväl användning av kunskaper från ett utbildningssammanhang som med aspekter av styrning och ledning.

### Artikel III

Den tredje artikeln, *Novice school principals in education and the enactment of pedagogical leadership in practice*, utforskar pedagogiskt ledarskap i rektorernas praktik och relaterar rektorernas arbete och lärprocesser till deras professionella yrkesbana. Mer specifikt studeras lärprocesser och utmaningar som uppstår i relationen mellan erfarenhet och kompetens när skolans kärnuppdrag är i fokus. Resultaten visar att vägen till rektorskapet påverkar rektorernas möjligheter att utöva pedagogiskt ledarskap i praktiken. Genom analysen framkommer att erfarenhet och kompetens är ömsesidigt beroende. Erfarenhet och kompetens behöver utvecklas i relation till såväl verksamhetsområdet som ledarskapspraktiken och

skolans specifika kontext. Erfarenhet kan bidra till utveckling av kompetens, men kompetens inom ett område kan också möjliggöra att nya erfarenheter skapas. När rektorns erfarenhet och kompetens står alltför långt ifrån verksamhetsområdet skapas inga kunskapsgenererande kopplingar. Avsaknad av erfarenhet och kompetens inom verksamhetsområdet förhindrar därför utövande av pedagogiskt ledarskap. Det visar sig såväl när det kommer till att leda skolans kärnprocesser om undervisning och lärande, som när det kommer till att organisera för undervisning och lärande. Dessutom förhindras rektorn av bristande erfarenhet och kompetens när det kommer till att relatera resultat och kvaliteter till elevers lärande för att leda till skolförbättring.

Det innebär att rektorerna antingen behöver lägga stor del av sin kapacitet på att försöka förstå de mest elementära delarna av verksamhetsområdet eller distribuera det pedagogiska ledarskapet. Det senare medför dock fortsatta svårigheter med att leda mot målen, att organisera verksamheten och att delta i att analysera och förstå resultaten. Studiens resultat visar att då rektorns erfarenhet och kompetens ligger nära verksamhetsområdet möjliggörs ett pedagogiskt ledarskap. Genom att rektorn använder praktikens repertoar i betydelsen djup förståelse av verksamheten i sitt lokala sammanhang när hen engagerar sig med lärarna och responderar på deras ageranden stödjer erfarenhet och kompetens lärande och utveckling. Artikeln visar också att när rektor saknar kunskap och erfarenhet av den specifika skolans situation hindras lärande och utveckling. Det betyder att rektor behöver skapa sig god förståelse för verksamhetsområde och lokal situation för att få legitimitet i sitt pedagogiska ledarskap. Rektorer som redan arbetat inom det verksamhetsområde och det lokala sammanhang där de tar sig an rektorsrollen har därvidlag ett stort försprång och kapacitet till att utveckla sitt pedagogiska ledarskap. Ett ytterligare betydelsefullt resultat är att studien visar att rektorer vilka saknar erfarenheter av skolledning hindras i sitt lärande inom ramen för Rektorsprogrammet genom att de saknar en skolledarrepertoar att vidareutveckla.

Vägen till rektorskapet i en svensk kontext kan se olika ut, men artikeln visar att de möjliggörande aspekterna för pedagogiskt ledarskap inte möts upp av vare sig kvalifikationskrav eller förutsättningar. För det första visar sig rektorerna ansvara för verksamheter de saknar lärarkvalifikation för, erfarenhet av och kunskap om. För det andra antar rektorerna ofta rektorsrollen i ett för dem okänd skola och huvudmannasammanhang. För det tredje kan rektorerna komma direkt från lärartjänstgöring utan vare sig kunskap om eller erfarenhet av vad rektorsrollen eller skolledning alls innebär. Därmed blir bristen på infrastrukturer för nya generationer av rektorer i det svenska skolsystemet påtagligt synlig. Artikeln konstaterar att dessa aspekter samspelar och påverkar möjligheten

att förbereda rektorer för pedagogiskt ledarskap. Det räcker därför inte att studera aspekterna separat utan de behöver studeras sammanhängande.

En viktig slutsats är att rektors ledarskap utvecklas i relation till erfarenhet av och kunskap om *något*, både ett verksamhetsområde och en kontext. När rektorerna saknar en eller flera av dessa erfarenheter och kompetenser begränsas deras möjligheter att lära samt utveckla ledarskap, i synnerhet gör sig detta gällande när det kommer till pedagogiskt ledarskap. Det gäller emellertid även den generella skolledarkunskap som Rektorsprogrammet syftar till att utveckla. Resultaten visar även att rektorer som har erfarenheter och kompetenser som inom ramen för Rektorsprogram och yrkespraktik skulle kunna utvecklas till att omfatta ett pedagogiskt ledarskap många gånger fräntas möjligheten genom att de söker sig till eller förflyttas av arbetsgivare till för dem helt okända verksamheter och kontexter. Resultaten visar att såväl rektorer som skolor drabbas hårt av detta fenomen. Skolorna har ofta en bristande tilltro till vad en novis inkommande rektor kan åstadkomma utifrån tidigare erfarenheter. Skolornas bristande tilltro blir ytterligare en svårighet för rektorerna att hantera då det visar sig påverka de ömsesidiga relationerna negativt.

I artikeln argumenterar jag för att skolledarpraktiker generellt behöver bli mer transparenta och synliga i skolor för att bidra till socialisering av nästa generation skolledare. Likväl argumenterar jag för att den enskilda skolans förbättringshistoria och sammanhållna pedagogiska riktning tillsammans med verksamhetsområdet behöver vara kärnan för att utveckla rektorskompetens och pedagogiskt ledarskap. Att tala om "en inkommande rektor" och "ett sammanhållet pedagogiskt program" skulle förstärka fokus på "skolan" som primär enhet snarare än rektorn.

### *Slutsatser*

Sammanfattningsvis visar avhandlingen att rektorernas lärandeprocesser sker i en ömsesidig relation mellan arbete och utbildning. Rektorerna speglar sina verksamheter och blir en slags 'externa granskare' utifrån sitt deltagande i Rektorsprogrammet och på så vis påminner de om Folkskolans statliga inspektörer. Deltagande i utbildningen leder många gånger till att rektorerna initierar förändringsprocesser i sina skolor. Dessa processer rör inte enbart rektorn utan påverkar skolornas arbete och kan leda till utveckling eller komma att omkullkasta redan pågående utvecklingsprocesser beroende av rektorns agerande.

Rektor kan således ta stöd i Rektorsprogrammet och kombinera verksamhetsansvar med resultatansvar och leda sin skola till större överensstämmelse med yttre krav. Avhandlingsstudien visar dock att det kräver att rektorn förstår och behärskar sin skolas verksamhet. Bristande förståelse gör att rektorerna inte kan

relatera till beprövad erfarenhet och kunskap inom verksamhetsområdet och inte heller kan meningsförhandla det pågående arbetet. De kan inte heller relatera de resultat som uppnås till undervisningen då de saknar kunskap om verksamhetsområdet. På så sätt hindrar bristande förståelse för verksamheten, i kombination med avsaknad av en delad repertoar med lärarna, möjligheterna att utveckla verksamheten. Därtill gör bristande kunskap att rektorer svårligen får legitimitet i verksamhetsnära frågor. När rektorer fråntas möjligheten att utveckla sitt pedagogiska ledarskap i relation till ett känt verksamhetsområde och kontext försätts de och deras verksamheter i en utsatt position där rektor inte kan förväntas bidra till skolans pedagogiska utveckling.

En slutsats av studiens resultat är dock att novisa rektorer med verksamhetsnära erfarenhet och kunskap kan hantera förbättringsarbete i skolor reflexivt och meningsförhandla förändringar med medarbetarna genom att knyta an förändringarna till skolans historiska och aktuella kontext. På så vis kan de också överbygga brister i den kollektiva sammanhängande förståelsen av den lokala skolans verksamhet. När rektorn tar hjälp av redskap kan behovet av förbättringsarbete och föreslagna lösningar bli legitima och förankrade hos medarbetarna. I sådana processer av kontinuerligt lärande tar rektor rollen som engagerad meningsmäklare med teoretisk förankring och professionella redskap och perspektiv med vilka praktiken kan förstås och utvecklas. Analytiska redskap i utbildningen är på så sätt en central och viktig del för deltagare eftersom redskapen hjälper dem till en fördjupad förståelse. Redskapen och den förståelse de leder till blir en integrerad del i rektorers professionella yrkesidentitet.

Rektorer som saknar insyn i och erfarenheter av skolledning visar sig dock hindras i sitt lärande av ledarkunskap inom ramen för Rektorsprogrammet. Avsaknad av ledningserfarenhet och en delad ledningsrepertoar gör det svårt för dem att koppla mellan utbildningens innehåll och den lokala skolans ledningspraktik. De uppfattar utbildningens analytiska redskap som abstrakta och svåra och missar grundläggande delar. Att uppleva utbildningen som abstrakt kan bidra till distansering och ett perifert deltagande. Deltagandet kan också vara ambivalent och inte gå i linje med utbildningens inriktning, ett marginaliserat deltagande. Endast några av Rektorsprogrammets deltagare visade sig ha lyckats skapa en identitet av fullt deltagande och med hög kompetens under sitt sista år i utbildningen.

Resultaten indikerar sammantaget att förändrade krav på rektorers arbete har lett till att parallella spår och tolkningar av rektorsrollen gjort sig gällande vilket påverkat rektorernas organisatoriska socialisation in i yrket. Professionell socialisation genom rektorsutbildning övervinner inte den socialisering som rektorerna har med sig in i utbildningen. Däremot lyckas rektorer med tidigare

ledningserfarenhet samt tidigare verksamhetsanknuten erfarenhet, vilka har en organisatorisk orientering gentemot arbetet, att vidareutveckla sin kunskap och förståelse genom sitt deltagande i Rektorsprogrammet.

Den här avhandlingsstudien bidrar till kunskapen om rektorer i utbildning på flera sätt. Studien bekräftar och stärker tidigare kunskapsbas genom att visa att bristande erfarenhet hindrar rektorernas lärande. Studiens resultat bekräftar att rektorers lärande i arbete och utbildning *kan* stödja rektorers lärande *men* många gånger separerar det som sker i praktiken från det som sker i utbildningen. Studien adderar därtill flera viktiga aspekter. Resultaten visar att förståelse av ledarskap är sammanvävd med identitet och därmed inte självklart utvecklas över tid genom deltagande i utbildning. Resultaten visar också på vilket sätt tidigare erfarenheter påverkar det lärande som sker i utbildning och arbete, varvid erfarenhet framhålls som en nödvändig och grundläggande bas för rektorerna. Vikten av att rektorn behärskar såväl sin skolas verksamhetsområde som skolans lokala situation framhålls. Erfarenhet av och kunskap om verksamhetsområdet genererar en repertoar som behövs för att kunna utveckla skolans kärnverksamhet i samspel med lärarna. Studien visar också hur det sammanvävda lärandet i utbildning och arbete inte bara påverkar den enskilda rektorn, utan också rektorns skola. Rektorerna visar sig också behöva erfarenhet och kunskap om skolledarpraktik för sitt lärande i rektorsutbildning. Studien visar emellertid att novisa rektorer i den svenska kontexten många gånger inte har sådan kunskap eller erfarenhet. Dessutom kan de ta sig an rektorsrollen i verksamheter där deras tidigare kunskaper inte gör sig gällande. Därmed tenderar de att framstå som 'fullkomligt novisa' såväl vad gäller skolledarskap som verksamhetsrelaterad och kontextuell kunskap.

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## Appendix

## Appendix A: In the Principal Training Programme

### *A1: Interviews at Educational Sites*

Educational organiser	Respondent	Date	Length of interview
A	Principal 1	180927	88 min
A	Principal 2	181205	77 min
A	Principal 3	181127	73 min
A	Principal 4	181126	73 min
A	Principal 1, 2, 3 and 4	190226	90 min
B	Principal 1	190128	75 min
B	Principal 2	190128	85 min
B	Principal 3	190129	79 min
B	Principal 4	190130	76 min
B	Principal 1, 2, 3 and 4	190425	100 min
C	Principal 1	180920	65 min
C	Principal 2	181119	74 min
C	Principal 3	181119	70 min
C	Principal 4	181120	59 min
C	Principal 5	181121	70 min
C	Principal 6	190313	90 min
C	Principal 1, 2, 3, 4, 5 and 6	181120	90 min

### *A2: Observations at Educational Sites*

Educational organiser A	Educational organiser B	Educational organiser C
2018-09-26	2019-01-28	2018-09-19
2018-09-27	2019-01-29	2018-09-20
2018-11-27	2019-01-30	2018-09-21
2018-12-03	2019-04-25	2018-11-19
2018-12-04	2019-04-26	2018-11-20
2018-12-05	2019-09-16	2018-11-21
2019-02-26	2019-09-17	2019-03-13
2019-02-27		2019-03-14

## Appendix B: In the Schools

### *B1: Interviews in Schools*

<b>The Seacoast School</b>	2019-03-06
Principal	104 min
Teacher 1	42 min
Special Educational Teacher	33 min
Teacher 2	33 min
<b>The South School</b>	2019-03-07
Principal	65 min
Teacher 1	21 min
<b>The Small-Town School</b>	2019-03-27
Principal	100 min
Teacher 1, Teacher 2, Staffperson	48 min
<b>The Rural School</b>	2019-04-02
Principal	70 min
Teacher 1, Teacher 2, Teacher 3	40 min
<b>The Big School</b>	2019-04-03
Principal	74 min
Teacher	26 min
<b>The Curlew School</b>	2019-04-04
Principal	56 min
Teacher 1, Teacher 2, Teacher 3	32 min
Special Educational Teacher 1, Special Educational Teacher 2	41 min
<b>The East School</b>	2019-04-10
Principal	78 min
Teacher 1, Teacher 2	70 min
<b>The meadow school</b>	2019-04-11
Principal	70 min
Teacher	37 min
<b>The Lake School</b>	2019-05-09
Principal	85 min
Assistant principal	40 min
Teacher 1, Teacher 2, Special Educational Teacher	45 min
<b>The Grove School</b>	2019-05-16
Principal	72 min
Teacher 1, Teacher 2, Staffperson	39 min
<b>The Castle School</b>	2019-05-17
Principal	76 min
Teacher 1, Teacher 2	40 min
<b>The North School</b>	2019-05-21
Principal	86 min
Assistant principal, Special Educational Teacher, Staffperson	45 min
<b>The Children's School</b>	2019-05-29
Principal	87 min
Teacher 1, Teacher 2	33 min
<b>The Peewit School</b>	2019-06-03
Principal	73 min
Teacher 1, Teacher 2, Special Educational Teacher	39 min

*B2: Observations in Schools*

The Seacoast School	2019-03-06
The South School	2019-03-07
The Small-Town School	2019-03-27
The Rural School	2019-04-02
The Big School	2019-04-03
The Curlew School	2019-04-04
The East School	2019-04-10
The Meadow School	2019-04-11
The Lake School	2019-05-09
The Grove School	2019-05-16
The Castle School	2019-05-17
The North School	2019-05-21
The Children's School	2019-05-29
The Peewit School	2019-06-03

## Appendix C: Presenting the Schools

*The South School [Södra skolan]* is a large 4-9 school owned by a large independent education providing company. The school is located in a small town and is housed in several buildings. The school is described as having good continuity in management. The principal has worked for a long time in the school in various roles including teaching and management work even though being newly appointed as principal. The school also has an assistant principal.

*The Castle School [Slottsskolan]* is a large municipal 4-9 school located in a municipal central town in a metropolitan region. The school is housed in several school buildings. The school has a principal and several assistant principals. The school also includes an F-3 school organised under the same principal but located elsewhere. The school is described as having an everchanging management organisation and many principals have come and gone. The principal has previously been assistant principal and deputy principal in the school.

*The Peewit School [Vipans skola]* is a large municipal F-6 school located in the countryside but relatively located in a metropolitan region. The school is housed in several school buildings. The school has three principals with responsibility for different units of the school. According to teachers, the school has had many different principals over time. The current F-3 principal has changed responsibility areas within the school several times during the first years as principal.

*The East School [Östra skolan]* is a medium-sized municipal F-6 school located in an urban area relatively far from any metropolitan region. The school has two new principals. Over time the school has had a stable structure in terms of management and organisation. The current principal 1-6 is novice as principal and is also new in the school but has stayed in the principal position at this school during the first years of principalship.

*The Small Town School [Småstadens skola]* is a municipal F-3 school located in an urban area outside the metropolitan areas. The school was previously organised in a different way concerning age-spans and the new F-3 principal was appointed in connection with the new arrangement. The principal is novice as a principal and new in the municipality, in the school and in F-3 schooling.

*The Lake School [Sjöskolan]* is a small municipal F-6 school, located in the countryside just outside a metropolitan area. The principal's responsibility includes another small school located elsewhere. The F-6 school is housed in several school buildings and besides the principal there is an assignment as assistant principal for part time. The school has had several ground-breaking changes of principal. The current principal has worked in the principal role for two years in the school. The principal is new in the municipality and school but has extensive experience of both F-6 and of school management work.

*The Rural School [Landsortsskolan]* is a municipal F-9 school located in a small urban area in the countryside. The principal's responsibility includes several other small schools located elsewhere. The school has several principals with responsibility for different units of the F-9 school. According to teachers, the principals' views on managing the school and the pedagogical program is diametrically different. These different values and leadership styles is described as fragmenting the school. Over time the school has had many different principals. The current F-5 principal is novice and has been given increased responsibilities in terms of more schools to run several times during the first years of principalship.

*The North School [Norra skolan]* is a large municipal F-9 school located in a small town. The current principal has only been in the school for a few months. The assistant principal is also new as principal, in the municipality and the school. The school has previously had a stable management organisation, but in recent years many changes of principal have taken place. This is described as having created many ambiguities. The current principal is novice and has been placed in different schools and towns and has changed responsibilities several times during the first three years of principalship.

*The Children's school [Barnens skola]* is a municipal F-9 school located in an urban area. The school is housed in several school buildings and has two principals with different areas of responsibilities. The current F-3 principal has been principal in this school for six months. The principal's responsibility includes another small school located elsewhere. The school is described as having changed management every 3-4 years, which is said to have disrupted systematic school development initiated by the municipality. The current principal has extensive experience of assistant management work in a similar sort of school in another municipality.

*The Seacoast School [Kustskolan]* is a small independent single F-9 school located in the countryside relatively close to a metropolitan region. The school has had a relatively stable continuity of management. The current principal is novice but has worked a long time in the school in different roles including teaching and management work.

*The Big School [Storskolan]* is a large municipal F-9 school located in a suburban area to a large central town. The school is led by several principals with different areas of responsibility. All of them are novice and participating in a principal programme. The 4-9 principal participating in the study came new to the school, municipality, 4-9, and role as principal but has stayed in the school during the first years of principalship.

*The Grove School [Dungens skola]* is a medium-sized F-6 school located in a densely populated suburban municipality in a metropolitan area. The novice principal was appointed one year ago to the school that has had the principal position vacant for several years. An assistant principal has however worked for many years in the school. The lack of leadership and management over time is described by teachers as negatively affecting schooling and causing ambiguities in organisation and caused interruption in improvement work.

*The Meadow School [Ängens skola]* is a municipal F-6 school located in rural areas outside the metropolitan regions. The school has changed principal at regular intervals and the current principal has been principal in the school for almost two years. The principal has previous experience of teaching and assistant management work in a similar type of school in another municipality.

*The Curlew School [Spovens skola]* is a rural municipal F-6 school located close to a metropolitan region. The school is housed in several school buildings, one of which is far from the others. A smaller school has previously been linked to the F-6 school but was recently spun off and adopted an independent management organisation. According to teachers, the municipality holds novice principals responsible for three years intervals at the school. Consequently, all three principals at the school are novice. The F-3 principal participating in the study is novice and new in the school and municipality. The principal has changed areas of responsibility within and between school during the first years of principalship.

## Appendix D: Interview Guides

### *D1: Interview Guide Individual Principal Interview in Training*

#### **Inledande frågor [Introductory Questions]**

Berätta kortfattat om din yrkesmässiga bakgrund och om den skola du leder.

Vad tänker du att du har lärt dig under dina år i Rektorsprogrammet? (*skriv på post-its*)

Berätta. Av det du har berättat, vilka saker känner du dig bekväm och säker i?

Vilken betydelse har det för ditt ledningsarbete och hur märks det?

-För dig i din egen praktik som ledare (*identitet, reflektion, agerande*)

-Konsekvenser för din verksamhet (*aktiviteter, processer, verktyg*)

[Tell briefly about your professional background and the school you lead. What do you believe you have learned during the course of the programme? (*Write on post-its*) Tell. From what you have told, what do you feel comfortable and confident in? What importance does it have for your work as principal, and how do you recognise? That is, for you in your practice as a leader (*Identity, Reflection, Enactment*) What are the consequences for your school? (*Activities, Processes, Tools*)]

#### **Lärande i arbete [Learning at Work]**

Din lokala skolpraktik, berätta kortfattat om hur den fungerar och är organiserad.

Kan du komma ihåg om du hade med dig någon idé om ditt ledarskap när du började som rektor på skolan? Har du kunnat omsätta den? Har du kommit att omformulera den? Utveckla.

Hade du förväntningar på vad du skulle komma att få lära dig i Rektorsprogrammet? Vad?

[Tell briefly about your school and how it is organised. Do you remember if you had any specific idea about leadership when you started out as a principal at the school? Have you been able to realize the ideas you had? Did you reformulate the idea? Develop your thoughts on this. Did you have expectations of what you would learn while participating in the programme? Tell.]

#### **Lärande i utbildning [Learning in Education]**

Märker lärarna på din skola av att du går Rektorsprogrammet? Hur? (*direkt/ indirekt*) Utveckla.

Hur tar du med dig/ tillämpar du ditt lärande från RP i skolans verksamhet? Kan du ge konkreta exempel? (*aktiviteter, situationer, handlingar, relationer, redskap*)

Konkretisera. *I vilka situationer gjorde du så, eller hände det...Vad gjorde du då? Vad hände?*

*Med vilka? Var det andra som agerade? Använde du någon särskild modell etc.*

Hur gör du för att ni på skolan skall få en gemensam kunskap och förståelse?

Har du mött motstånd? Hur yttrar sig det i så fall? Hur hanterar du det?

[Do the teachers at your school notice that you are attending the programme? (*Directly or Indirectly*) In what ways? Develop your thoughts on this matter. How do you apply what you have learned? Please give examples in terms of activities, situations, enactments, relations, tools. How do you make sure that you get a common knowledge and understanding among teachers at your school? Did you meet resistance? If so, what does it say? How do you handle it?]

Hur uppfattar du att ditt lärande skett under dina första år som rektor? Har utbildningen bidragit? Utveckla. Vilka konkreta aktiviteter, situationer, redskap, relationer, handlingar tillmäter du betydelse för ditt lärande?

[How do you perceive your learning during your first years as principal? Has participation in the programme contributed? In what ways? Develop your thoughts. What importance do you place on certain activities, situations, tools, relationships, actions etcetera?]

### Avrundning [Ending]

Hur har du tagit dig an Rektorsprogrammet?

Har du haft några specifika strategier när det gäller ditt deltagande?

Är det något särskilt du vill tillägga, som har med lärandet eller relationen mellan utbildning och verksamhet att göra?

[How did you approach the Principal Programme? Any strategies for participation? Is there anything you would like to add that has to do with learning or the relationship between participation in the programme and you work as a principal?

### D2: Interview Guide Focus-Group Interview

#### Fokusgrupp intervjuguide Tid avsatt: 90 minuter

*Rekvisita: Teman och frågeställningar, post-its, pennor.*

*Presentationsrunda: förmamn, typ av skola, ansvarig för åk, ansvar för antal personal*

#### Tema 1 Yrkeskunskap

När (i vilka situationer) upplever du att du har behov av och använder dig av yrkeskunskap? - *Skriv på de gröna korten*  
- *Välj ett kort per person, i tur och ordning tills uttömt*

Beskriv utifrån era kort.

Vilka situationer du står inför *erfordrar* yrkeskunskap (utifrån ditt sätt att se det)? - *Skriv på de gula korten*  
- *Välj ett kort per person, i tur och ordning tills uttömt*

Vad bidrar RP med för dig som rektor?

#### Tema 2 Profession

Vad tänker du ligger till grund för hur du tar er an ledararbetet i skolan? Jag tänker främst på ert ledarskap och era ageranden, hur ni väljer att handla i olika situationer.

Har ni tillgång till kollegialt stöd i form av t.ex. rektorsnätverk och hur fungerar det arbetet?

Ifrågasätts ni någon gång? På vilka sätt och av vem?

Finns det tillit till den professionella kunskapen, jmf ifrågasättanden?

#### Tema 3 Utbildning

Har du märkt av att din syn på yrket påverkats av utbildningen på något sätt? Beskriv.

Vad säger andra om att du går en rektorsutbildning?

Vilka förväntningar känner du av? (från utbildningen, staten, huvudmannen, kollegor, lärare, vårdnadshavare etcetera)

#### Tema 4 Identitet

Hur är det att gå i Rektorsprogrammet? Vem är man (du) här i det här sammanhanget?

Hur är det att vara på arbetsplatsen? Vem är man (du) där?

Vem är man (du) i den kommunala/fristående organisationen?

#### Avrundning

Är det något särskilt ni vill tillägga som ni har kommit att tänka på under samtalet som anknyter till det vi har pratat om?

*Tack för er medverkan!*

## Focus Group Interview Guide Time: 90 minutes

*Presentation: Name, Type of School, Responsibilities.*

### Theme 1 Professional knowledge

When (in what kind of situations) do you use professional knowledge specifically?

- *Write on the green cards*

- *Tell from your cards*

Describe.

- *Write on the yellow cards*

What situations do you face *that require* professional knowledge (based on your view on the matter)?

- *Tell from your cards*

What does the principal programme contribute to you as a principal?

### Theme 2 Profession

On what basis do you approach leadership work in school in terms of leadership and how you choose to act in different situations?

Do you have access to collegial support in the form of for example a principal network?

Describe how this works in your organisation.

Are you ever questioned in your professional work? In what ways and by whom? What kind of confidence concerning professional knowledge do you encounter at work?

### Theme 3 Education for Principals

Has your view of the profession been affected by the programme in a way that you recognize? Describe.

What do other people say about your participation in a principal programme? What sort of expectations do you experience (from education, the state, the municipality or independent school provider, colleagues, teachers, students, parents, other stakeholders, friends, etc.)

### Theme 4 Identity

What it is like to participate in the programme? Who are you here in the educational context?

What it is like to be in your workplace? Who are you in your working context in terms of your school and in terms of your municipal or independent organisation?

### Ending

Is there anything in particular that crossed your mind that you want to add related to what we have talked about?

*Thank you all for participating!*

## D3: Interview Guide for Significant Others at Schools

### Skolintervju betydelsefull andre

Presentera ditt namn, kort om din bakgrund på skolan och ditt uppdrag här.

Vad har skolan för ledningsbakgrund under den tid du varit anställd här?

[Present yourself. Tell about your assignment at the school and your background at this school. Tell about the management work at the school during your employment.]

Vad tänker du är det viktigaste i uppdraget för den som är rektor här på skolan?

*Sense-Making, Power and Politics, Activity-Process, Body and Material Things*

[What is most important concerning principal's work at the school?]

Hur arbetar rektor konkret med de sakerna?

*Communication, Enactment, Tools. Activity-Process, Body and Material Things*

[How does the principal work with those important issues?]

Ge konkreta exempel på aktiviteter (*Inbegripet vilka? När? Hur ofta? Hur? Med vilket mål? Nyttä? Enstaka händelser? Systematik? Rutiner? Hur följs de upp?*)  
Situation Handling Relationer Process Verktyg

*Activity-Process, Body and Material Things*

[Please describe and give examples of important work.]

Vad mer ägnar rektor mer sin tid åt som du kan se?

*Body and Material Things*

[What more does the principal spend time with?]

Vad är det viktigaste som har åstadkommit sedan nuvarande rektor började arbeta här som rektor? Vilka förändringar syns?

*How did it happen? Communication, Enactment, Tools. Activity-Process, Body and Material Things*

[What are the most important improvements since the current principal started working here? What development work has become visible?]

Hur arbetar rektor med att utveckla skolan?

*Sense-Making*

[How does the principal work to develop the school?]

Hur arbetar ni tillsammans på skolan för att förbättra elevernas lärande?

*Activity-Process*

[How do you work together at the school to improve teaching and students' learning?]

Hur arbetar rektor med att stötta läraarnas lärande och professionella utveckling?

*Activity-Process*

[How does the principal work to support teachers' learning and professional development?]

Var hämtar rektor stöd, vägledning och kunskap som behövs i arbetet, tänker du?

*Sense-Making, Body and Material Things*

[Where do you think the principal gets the support, guidance and knowledge needed in the work?]

Händer det att rektor nämner eller delar med sig av erfarenheter eller redskap från Rektorsprogrammet i vardagsarbetet så att du noterar det? Utveckla.

*Sense-Making, Body and Material Things Communication, Enactment, Tools.*

[Does the principal mention or share experiences or tools from the principal programme in everyday work so that you take note of it? Develop your thoughts on this issue.]

*Avslutning, tack för er medverkan. [Eventual follow-up questions. Ending: thank you for participating!]*

#### D4: Interview Guide Individual Principal Interview at School

##### Individual School Interview with Principal

Vad tänker du är de viktigaste delarna i ditt uppdrag som rektor här på skolan?	Silent reflection, write on post-it notes. Make your prioritization of topic order.
[What are the most important parts of your assignment as principal here at the school?]	<i>Sense-Making Power and Politics, Activity-Process, Body and Material Things</i>
Hur arbetar du konkret med de här olika sakerna som du har lyft?	Communication, Enactment, Tools. <i>Activity-Process, Body and Material Things</i>
[How do you approach and work with these parts of the assignment here at the school?]	
Ge konkreta exempel: Aktiviteter (inbegripet vilka? När? Hur ofta? Hur? Med vilket mål? Nyttä? Enstaka händelser? Systematik? Rutiner? Hur följer du upp dem?) Situationer Handlingar Relationer Processer Verktyg	<i>Activity-Process, Body and Material Things</i>
[Give some examples of activities, enactments, situations, processes, tools and relations. Who are attending; where, how and when do you meet? With what purpose? Usefulness? Is it single events or is there a structure? What routines? How do you follow-up?]	
Vad bygger du de här olika delarna på för insikter / kunskaper?	<i>Sense-Making</i>
[What insights or knowledge do you find useful in this work?]	
Vad mer ägnar du huvudsakligen din arbetstid åt?	<i>Body and Material Things</i>
[What do you mainly spend your working time on besides the work you described already?]	
Vad är det viktigaste ni har åstadkommit på skolan sedan du började arbeta här som rektor? Vilka förbättringar syns?	Give explicit examples. Communication, Enactment, Tools. <i>Activity-Process, Body and Material Things</i>
[What is the most important thing you have achieved at the school since you started working here as principal? What improvements are visible?]	
Vad är det viktigaste du har lärt dig sedan du började arbeta som rektor?	<i>Sense-Making</i>
[Since you stated working as a principal, what is the most important you have learned?]	
Vilka har varit de största utmaningarna? Hur har du burit dig åt för att hantera dem?	<i>Activity-Process, Body and Material Things</i>
[What challenges did you face? How did you manage to handle these challenges?]	
Vad är du ännu inte nöjd med i hur du agerar i din egen yrkespraktik? Hur ska du komma till rätta med det?	<i>Sense-Making</i>
[In what ways do you want to change your leadership practice? How are you going to deal with that?]	

Hur arbetar du konkret med att utveckla skolan?	<i>Sense-Making</i>
[Describe your work with improving the school.]	
Hur arbetar ni på skolan för att förbättra elevernas lärande?	<i>Activity-Process</i>
[Describe your joint improvement work at the school concerning core processes of teaching and learning.]	
Hur arbetar du som ledare med att stötta lärarnas lärande och professionella utveckling?	<i>Activity-process</i>
[Describe your work with supporting teachers' professional development.]	
Hur fungerar din professionella relation/ din verksamhets relation till huvudmannen? Hur går kommunikationen till?	<i>Activity-Process, Power and Politics</i>
[Describe the professional relations between your school and the municipal or independent organisation that you are part of.]	
Var hämtar du stöd, vägledning och kunskap som du behöver i ditt arbete?	<i>Sense-Making, Body and Material Things</i>
[Where do you get the support, guidance, and knowledge you need in your work?]	
Tänker du på /använder du kunskap från RP i vardagsarbetet? Utveckla. På vad sätt hjälper RP dig att hantera praktiken? (Exempel på möjliga följdfrågor: När och hur blir den kunskapen synlig? För dig? För andra? I vilka former förs det över? Kursuppgifter? Annat? Samarbetar du med andra kursdeltagare på hemmaplan?)	<i>Sense-Making</i> <i>Body and Material Things</i>  How? Any use of primary tools? Any use of secondary tools?
[Describe if and if so, how you take support in the principal programme in your daily work.]	
Finns det delar i utbildningen du förkastat eller håller ifrån dig? Utveckla.	<i>Sense-Making</i>
[Describe and develop your thoughts on rejecting any parts or contents of the programme.]	
Hur ser du på din yrkesmässiga framtid?	<i>Sense-Making, Identity</i>
[Describe what you think about the future in terms of professional career.]	
Kan du tänka dig att åter arbeta som lärare/fritidspedagog/annat i framtiden? Utveckla.	<i>Sense-Making, Identity</i>
[Can you imagine working as a teacher / Educare-teacher/ other former occupation again? Why is that?]	
Vilka råd skulle du idag ge till någon som var helt ny i yrket?	<i>Activity-Process</i>
[What is your best advice to a novice principal?]	

## Appendix E: Observation Protocol

Observational Focus		Notes
<b>Situation</b> [Situation]	Body and Material Things Sensemaking	
<b>Content</b> [Innehåll]	Body and Material Things Sensemaking External Domain Activity-Process Knowledge-Beliefs	
<b>Tools</b> [Redskap]	Body and Material Things Sensemaking Communication Negotiation Border Crossing	
<b>Instruction</b> [Instruktion]	Activity-Process Practice Domain Sensemaking	
<b>Engagement</b> [Engagemang]	Personal Domain Practice Domain Reflection Enactment Learning-Meaning Border Crossing	
<b>Meta</b> [Meta]	Reflection Researcher Notes	

Date: \_\_\_\_\_ Title: \_\_\_\_\_

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## Appendix F: Information About the Study (Examples in Swedish)



INSTITUTIONEN FÖR PEDAGOGIK  
OCH SPECIALPEDAGOGIK

## Forskningsstudie om skollärautbildningens betydelse

Jag heter Stina Jerdborg och kommer under hösten 2018 och våren 2019 att genomföra en forskningsstudie om betydelsen av skollärautbildning för rektorers ledningsarbete. Studien syftar till att utveckla kunskap om betydelsen av skollärautbildning för rektorers praktiska ledningsarbete samt hur det relaterar till yrkesidentitet och skolläraprofession. Forskning om deltagares sätt att ta sig an en statlig utbildningsinsats, så som Rektorsprogrammet, är angelägen ur ett samhällsperspektiv. Studiens intresse riktas i det här fallet till skollärares yrkesarbete och lärande och inte till deltagande individer som personer. Studien kommer att genomföras vid flera olika lärosäten i kursgrupper som går sitt tredje år i utbildningen. Din kursgrupp är en av dem.

Studien innebär att öppna observationer i utbildningssammanhanget kommer att företas, här är det arbetet i utbildningssammanhanget som fokuseras liksom deltagande och engagemang från deltagarnas sida. Anteckningar om sammanhanget och om deltagares inspel kommer att göras. I vissa fall kan ljudupptagning förekomma. Inga anteckningar eller inspelningar i utbildningssammanhanget kommer att kopplas till individer med namn eller andra uppgifter av personlig karaktär. Insamlad material kommer endast att användas i forskningssyfte.

Jag kommer även att kontakta några av er för intervjuer. Det gäller rektorer som arbetar inom grundskola med kommunal eller fristående huvudman. Medverkan innebär då att

- Delta i en individuell intervju i anslutning till ett kursinternat.
- Delta i en gruppintervju i anslutning till ett kursinternat.
- Ta emot besök i din skola under 1-2 dagar och där delta i ytterligare en individuell intervju.

Dina svar kommer att behandlas så att de inte ska kunna kopplas till dig eller till din skola. Ditt deltagande innebär att du är med och bidrar till den pedagogiska forskningen i Sverige samtidigt som du och din skola får ta del av pågående praktisk forskning. För dig kan det vara ett tillfälle att få reflektera över och sätta ord på hur du utvecklas i din yrkesroll och hur du arbetar med att utveckla verksamheten i din skola. Du får även möjlighet att konkret visa hur du tänker om och hur du praktiskt använder dig av dina kunskaper i din vardag, hur du menar att det påverkar verksamheten och vilka svårigheter du stöter på. Det kan i sin tur möjliggöra ett fördjupat lärande för dig.

Att delta i intervjuer är givetvis valbart. Du kommer även att ha möjlighet att avbryta ditt deltagande under studiens gång om du finner det nödvändigt. Du behöver då inte ge en närmare motivering till detta. Om någon kursdeltagare inte vill medverka i utbildningsdelen av studien kommer den personens deltagande att uteslutas ur insamlad material och blir därmed inte föremål för utskrift eller analys.

Jag är doktorand vid Institutionen för pedagogik och specialpedagogik vid Göteborgs Universitet. Studien ingår i mitt avhandlingsarbete. Utöver detta arbetar jag med fortbildning av rektorer inom FFR. Du kan läsa mer om mitt arbete här [Personlig sida Göteborgs Universitet](#)

Kontakta mig för frågor om studien.

Välkommen! *Stina Jerdborg*

Tel: 031-786 23 58

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Forskningsansvarig: Stina Jerdborg, doktorand vid Institutionen för pedagogik och specialpedagogik,  
Pedagogen hus A, Västra Hamngatan 25, Box 300, 405 30 Göteborg  
031 786 23 58, [stina.jerdborg@ped.gu.se](mailto:stina.jerdborg@ped.gu.se), <https://ips.gu.se/om-ips/personal?userId=xjstin>

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## INSTITUTIONEN FÖR PEDAGOGIK OCH SPECIALPEDAGOGIK

### Forskningsstudie om skolläraryrket och skolledarutbildningens betydelse

Under hösten 2018 och under 2019 kommer en forskningsstudie om betydelsen av skolläraryrket och skolledarutbildning för rektorers ledningsarbete att genomföras i Rektorsprogrammet. Studien syftar till att utveckla kunskap om betydelsen av skolläraryrket för rektorers praktiska ledningsarbete samt hur det relaterar till yrkesidentitet och skolläraryrket. Du kan läsa mer om studien i bifogat informationsbrev.

Med din underskrift intygar du att du tagit del av information om den studie som under hösten 2018 och 2019 kommer att genomföras i Rektorsprogrammet vid ditt lärosäte. Om du som kursdeltagare inte vill medverka i utbildningsdelen av studien kommer ditt deltagande att uteslutas ur insamlat material och blir därmed inte föremål för utskrift eller analys. Du meddelar då forskningsansvarig.

Några av er kommer att bli kontaktade för intervjuer. Det gäller rektorer som arbetar inom grundskola med kommunal eller fristående huvudman. Medverkan innebär då att

- Delta i en individuell intervju i anslutning till ett kursinternt.
- Delta i en gruppintervju i anslutning till ett kursinternt.
- Ta emot besök i din skola och där delta i ytterligare en individuell intervju.

Dina svar kommer att behandlas så att de inte ska kunna kopplas till dig eller till din skola. Genom att delta i intervju ger du ditt samtycke till att delta i forskning genom att ta del, handling, inlämnade texter och annat material som insamlas i studien kan utgöra datamaterial och bli underlag för analys och forskningspublikationer (forskningsartiklar, konferenspresentationer etc). Allt material kommer att behandlas konfidentiellt<sup>1</sup>. Samtycket gäller under hela forskningsstudien. Det är möjligt att när som helst återkalla ett lämnat samtycke genom att kontakta forskningsansvarig.

Jag intygar att jag tagit del av information om ovanstående beskriven forskningsstudie.

\_\_\_\_\_

Datum Underskrift

\_\_\_\_\_

Namnfortydligande

<sup>1</sup> Se vidare skrivningar om "informerat samtycke" <http://www.codex.vr.se/manniska2.shtml>

Hej \_\_\_\_\_!

Hoppas du haft en bra start på det nya året. Det börjar bli dags för mig att boka in datum för de skolbesök som jag skall genomföra inom forskningsstudien om betydelsen av skolläraryrket för rektorers ledningsarbete.

Mitt förslag till dig är att jag besöker dig i din skola: \_\_\_\_\_

Om dagen är olämplig eller om du har ett datum som passar dig bättre så ser vi om jag kan justera min planering. Jag försöker som regel samordna närallgande skolbesök, vilket betyder att ni är två skolor som behöver kunna ta emot på angränsande dagar. Jag beräknar att besöket kan pågå ungefär mellan klockan 9 -16.30, beroende på tider för kommunikationer och verksamhet.

Under dagen behöver vi tillgång till 90 minuter ostörd tid då en intervju kan genomföras. Du planerar vilken tid och lokal som är mest lämplig.

Om möjligt önskar jag även intervju 3 medarbetare i olika roller, och som känner ditt arbete relativt väl. Det kan vara till exempel specialpedagog, förstelärare och lärare (utan specialfunktion). Jag är tacksam om du vill tillfråga dina medarbetare om detta i förväg och om ca 45 min kan avsättas för detta ändamål. Intervjun genomförs som en gruppintervju.

Resterande tid av dagen tänker jag mig att följa dig och observera de situationer du ställs inför i ditt arbete.

Om jag kommer att närvara vid till exempel möten eller samtal är det bra om du har möjlighet att informera berörda om min närvaro som forskare. I annat fall kan jag informera på plats. Jag kan komma att göra anteckningar och eventuellt någon ljudupptagning, men endast i forskningssyfte och ingenting som kan kopplas till någon specifik person kommer att antecknas. Även skolan som sådan kommer att behandlas konfidentiellt i studien.

Om något möte där du eller övriga deltagare inte tycker att det är lämpligt att jag är med behöver hållas den aktuella dagen så avstår jag självklart från att närvara vid det.

Bekräfta så snart som möjligt om föreslaget datum passar dig!

Ser fram emot att få möta din verksamhet.

Med vänliga hälsningar *Stina*

Stina Jerdborg  
PhD student/Doktorand  
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## INSTITUTIONEN FÖR PEDAGOGIK OCH SPECIALPEDAGOGIK

### Forskningsstudie

Jag heter Stina Jerdborg och genomför under hösten 2018 och våren 2019 en forskningsstudie som syftar till att utveckla kunskap om skollärautbildning och rektorers praktiska ledningsarbete. Studien kommer att genomföras med rektorer som går sitt tredje år i Rektorsprogrammet. Studiens intresse är skollärares yrkesarbete och lärande och inte de enskilda rektorerna som personer.

Några av de rektorer som deltar i studien tar även emot besök i sin skola. I samband med detta kan du som pedagogisk personal komma att bli tillfrågad om att delta i en kortare intervju. Intervjun kommer att handla om hur ni på skolan arbetar med att utveckla ert och elevernas lärande, det vill säga hur ni och skolans rektor arbetar för att ni tillsammans ska kunna utveckla skolan.

Dina svar kommer att behandlas så att de inte ska kunna kopplas till dig eller till din skola. Insamlad material kommer endast att användas i forskningssyfte.

Ditt deltagande innebär att du är med och bidrar till den pedagogiska forskningen i Sverige samtidigt som du och din skola får ta del av pågående praktisk forskning. För dig kan det vara ett tillfälle att få reflektera över och sätta ord på hur ni arbetar med att utveckla er skola.

Att delta i intervjun är valbart. Du kan kontakta mig för att avbryta ditt deltagande under studiens gång om du finner det nödvändigt. Du behöver inte ge en motivering till dina skäl.

Jag är doktorand vid Institutionen för pedagogik och specialpedagogik vid Göteborgs Universitet. Studien ingår i mitt avhandlingsarbete. Utöver detta arbetar jag med fortbildning av rektorer inom FFR. Du kan läsa mer om mitt arbete här [Personlig sida Göteborgs Universitet](#)

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Välkommen! *Stina Jerdborg*

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## INSTITUTIONEN FÖR PEDAGOGIK OCH SPECIALPEDAGOGIK

### Forskningsstudie

Under hösten 2018 och under 2019 kommer en forskningsstudie om skollärautbildning och rektorers ledningsarbete att genomföras bland rektorer som går sitt tredje år i Rektorsprogrammet. Studien syftar till att utveckla kunskap om skollärautbildning relaterat rektorers praktiska ledningsarbete. Du kan läsa mer om studien i bifogat informationsbrev.

Några rektorer som arbetar inom grundskola med kommunal eller fristående huvudman tar inom ramen för studien emot besök i sin skola. I samband med detta kan du som pedagogisk personal komma att bli tillfrågad om att delta i en kortare intervju.

Intervjun kommer att handla om hur ni på skolan arbetar med att utveckla ert och elevernas lärande, det vill säga hur ni i personalen respektive hur skolans rektor arbetar för att ni tillsammans ska kunna utveckla skolan.

Dina svar kommer att behandlas så att de inte ska kunna kopplas till dig eller till din skola. Genom att delta i intervju ger du ditt samtycke till att delta i forskning genom att tal, handling, inlämnade texter och annat material som insamlas i studien kan utgöra datamaterial och bli underlag för analys och forskningspublikationer (forskningsartiklar, konferenspresentationer etc). Allt material kommer att behandlas konfidentiellt<sup>1</sup>. Samtycket gäller under hela forskningsstudien. Det är möjligt att när som helst återkalla ett lämnat samtycke genom att kontakta forskningsansvarig.

Jag intygar att jag tagit del av information om ovanstående beskriven forskningsstudie och samtycker till att delta.

Datum

Underskrift

Namnförtydligande

<sup>1</sup> Se vidare skrivningar om "informerat samtycke" <http://www.codex.vr.se/manniska2.shtml>

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Novice principals are expected to acquire professional skills when participating in education. This thesis explores novice principals' learning and their understanding of principalship in a Swedish context as principals of compulsory school who participate in their third year in the mandatory Swedish National Principal Training Programme are socialised into the role through education and practice. A practice perspective is adopted, interviewing and observing principals situated in their educational and workplace practice. Wenger's social theory of learning constitutes the theoretical frame.

The findings show different understandings of leadership at play, closely related to identity. Principals' orientation toward work has an influence on both their participation in the programme and their experience of practice. Based on programme participation, principals become external reviewers. Intertwined processes of engagement in training and practice affect schools, leading to development as well as conflicts and ruptures. The importance of leading 'from within' and acting as broker—thus gaining legitimacy—is revealed. Leadership knowledge develops in relation to previous areas of experience and expertise. When deprived of this competence, novices lack the ability to engage in pedagogical leadership.



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