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Moving towards, into and through principalship: developing a framework for researching the career trajectories of school leaders

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Abstract

Purpose – The paper seeks to develop a conceptual framework capable of informing future research into beginning principalship in diverse cultural contexts.

Design/methodology/approach – Based on recent literature, and specifically drawing on contributions to this Special Issue, the paper explores the relationship between externally generated pressures and tensions facing beginning principals and their influence on principal socialisation and development.

Findings – The paper identifies tensions between increasing pressure on schools to meet a diverse range of social objectives and a context of high-pressure accountability, limited resources and increasing institutional and systemic complexity uncertainty. Beginning principals face the difficult task of having to reconcile these tensions and in some contexts there is emerging evidence of this impacting on a crisis in principal supply. The paper argues that if systemic problems of supply are to be addressed educational researchers need to develop more sophisticated ways of understanding what factors shape individuals' career paths as they move towards, into and through principalship. One such approach is discussed that integrates the concepts of personal socialisation, professional identity and career trajectory and links these to wider contextual issues.

Originality/value – The paper presents a conceptual framework to underpin future research into the early years of principalship.

Keywords Principals, Career development, Work identity, Socialization

Paper type Conceptual paper

Introduction

Interest in the early years of principalship inevitably focuses on the specific nature of the role that teachers assume as they make the key transition from teacher, possibly with substantial experience of whole school management and administration, to principal. It is clear from the papers in this Special Issue just how significant and complex are the changes in the principal's role. Pressures on school leaders are increasing substantially (Leithwood *et al.*, 1999; Gronn, 2003), and in many countries, particularly in Western societies, there is strong evidence to suggest a looming crisis in principal supply. Within the UK there has been evidence for some time of a shortage of those willing to take on, and/or remain in the post of headteacher/principal. The imbalance between demand and supply is forecast to worsen, with predictions of a long-term, systemic crisis (Howson, 2003, 2004; Hartle and Thomas, 2003). Many

Journal of Educational Administration
Vol. 44 No. 4, 2006
pp. 408-420
© Emerald Group Publishing Limited
0957-8234
DOI 10.1108/09578230610676604

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existing headteachers are choosing to take early retirement or leave the profession. Howson (2003) reports that the ageing of the profession has reduced the number of teachers in the key 40-49 age group, from which two-thirds of new headship appointments are made, compared with a decade ago. In 2006 more than half the teaching profession is over 50; and one-third of those not retiring have indicated their intention to leave within the next five years (Hartle and Thomas, 2003). This situation is echoed in many countries outside the UK with instances cited in contributions to this issue (see, for example, Quong, 2006).

Even in international contexts where there is no apparent crisis of principal supply, there is strong evidence of similar pressures and tensions confronting those who take on the role of leading schools. Only the contextual specificity of differing labour markets, in Asia or Africa for example, prevents problems arising. Overwhelming evidence points therefore to the increasingly difficult nature of the role we expect principals to undertake. Although this may be experienced differently in different international contexts, and pressures and tensions will certainly manifest themselves differently, it is clear that a number of common issues are combining to make the principal's role an increasingly challenging one.

However, if ambitions for system-wide reform and improvement are to be met, principalship has to be seen as an appealing and sustainable career capable of attracting, retaining and motivating the highest calibre teacher leaders. There can be no benefit from deterring able potential leaders from taking on the role, or rapidly burning out and discarding those who choose to take the risk.

Consequently, there is an imperative to better understand the career trajectories of teachers as they potentially move towards, into and through principalship. The need is to do more than explain the processes of leadership; rather, it is to begin to understand the experiences and motivations of teachers as they progress through their careers. As Earley and Weindling (2004) conclude, "There is little information available on heads' career paths – either before or after they become headteachers" (p. 31). Put simply, we know little about why teachers decide to move up, stay put or even bail out. Such understandings necessitate a complex appreciation of the fine detail of career transitions and hence a focus, for example, on the distinctive issues relating to key phases in the preparation for, and undertaking of, principalship (see Weindling and Dimmock, 2006). To date, the early years of principalship as a focus of study have been relatively neglected. However, the contributions to this Special Issue, and the studies on which they are based, testify to a growing research base on which it is important to build and develop an increasingly rich and sophisticated understanding of the specific issues relating to early phase principalship.

This paper has two key aims. First, it seeks to map the terrain of current debates and to make the case for further study of early phase principalship by exploring the global social, demographic, economic, cultural and political trends that are impacting on education and, by definition, the role of principalship. Second, it aims to construct a framework for research into career pathways towards, into and through principalship that capture existing approaches and methodologies, and suggests future directions.

A common theme of the papers in this Special Issue is that becoming a principal involves assuming a key professional leadership role at a time of rapid social change and considerable uncertainty. It is over 20 years since Schön (1983) highlighted the implications for professional practice of increasing uncertainty in relation to both

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means and ends within a given field. Since then the pace of change has hastened and uncertainties and insecurities have grown exponentially (Hargreaves, 2003). Such circumstances generate pressures and tensions that are endemic at system level, but which need to be addressed, and indeed reconciled, at institutional level. This paper draws on contributions to this Special Issue and wider studies to distinguish between systemic pressures and tensions, and suggests the dissonance between the two represents a key problem for those presently leading educational institutions and others moving towards, and into, principalship. Pressures are identified as arising from the expectations, from diverse sources, placed on those working in schools. Tensions, in contrast, refer to those contextual conditions that are often in conflict with meeting societal expectations.

Identifying the context – growing pressures

Many of the papers in this Special Issue highlight, in their different ways and contexts, the rising expectations placed on educational systems to deliver key societal objectives (see in particular the contribution by Crow, 2006). In recent years such expectations have grown in both scale and complexity. These stem from a number of interdependent developments in global society. In particular it is important to highlight the following issues around which societal expectations have placed particular pressures on educational institutions. This is not intended as a definitive list but rather the identification of a number of broad headings that frame the context in which schools, and school leaders, function.

Human capital and the pressure for "productivity"

Global economic pressures confront all societies in different ways. The advanced economies of the West have for a long time struggled to come to terms with increasing competition from Southeast Asia. These economies in turn are now threatened by the comparative advantage being developed by China and India, not only in manufacturing, but in services, too. Almost regardless of an economy's relative maturity, investment in human capital is seen as the key to future growth and prosperity. Developed economies see this as the only way to maintain added value in their high-cost economies, whilst developing countries see access to the knowledge economy as a pre-condition if they are to emerge from poverty-wage mass production and low-return agriculture. The consequence of this has been to elevate education policy as a pivotal element of supply-side driven economic policy (Bell and Stevenson, 2006). With this rise in the importance of education has come a rise in expectations. There is now a global orthodoxy that places relentless pressure on educational organisations to increase "productivity", manifested in both quantitative and qualitative terms, to increase rates of participation and simultaneously to raise "standards" (both narrowly and broadly defined).

Ethnic diversity and the pressure for social cohesion

Trends associated with globalisation are not restricted to increasing movements of capital, but of people, too. Such developments are of course linked. Global inequalities in wealth, coupled with the changing labour needs of the advanced economies, drive increasing population flows around the world. The impact of these population movements is enlarged as war and political persecution compels increasing numbers to

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seek refuge and asylum in apparently safer environments. The outcome in many countries, predominantly in the West but by no means exclusively, is an increase in ethnic diversity that brings both opportunities and challenges. Opportunities are provided by the increasingly rich social composition of host communities. Changing populations, however, challenge traditional notions of national identity, and such challenges are often perceived as threatening. The consequence is to increase expectations on schools to promote social cohesion, and to help reinforce a sense of national identity (Dimmock *et al.*, 2005). Examples can be provided from around the world, but illustrations from diverse contexts are provided by the UK (Qualifications and Curriculum Authority, 1998), Israel (National Task Force for the Advancement of Education, 2004) and Rwanda (Rutayisire, 2004).

Social alienation and the pressure for inclusion

A third pressure derives from the expectations placed on schools to address a diverse range of complex social problems that frequently generate feelings of disengagement and alienation, particularly amongst the young. The specific nature of these issues varies enormously across countries, but a common feature is that as many of these problems become more acute, the infrastructure available to address them is simultaneously diminishing. As a result, additional pressures are placed on schools to fill the void. For example, development in sub-Saharan Africa remains blighted by the AIDS pandemic. Schools not only have a major role in promoting AIDS education, but in supporting children orphaned by the illness. Elsewhere problems of social exclusion and alienation, especially amongst young people, may present themselves very differently. However, in many contexts a background to these pressures is an apparent decline in the ability of traditional institutions to offer convincing solutions. Given this vacuum, there is often an increasing expectation that those working in schools will somehow fill the gap.

It is clear that the pressures on schools are considerable. They derive from global economic trends, complex demographic developments and the growth of social problems that are themselves often rooted in economic and social inequalities. The pressures, however, are accompanied by an increasing expectation that schools will be able to offer a societal response to these issues. In turn, the spotlight is switched to those who lead schools, not least because the rising tide of expectations placed on schools and their leaders is counter-balanced by a corresponding range of tensions that seem to militate against developing a successful response.

Identifying the context – managing tensions

Tensions are identified as those factors that can, in a given set of circumstances, make it more difficult to provide effective schooling and provide a response to the expectations set out above. They are not problematic *per se* (few would disagree with the need for accountability, for example) but in the way, and in the specific form, they are experienced by those working in schools they can present particular challenges for school leaders. They frequently pull in a contrary direction to that indicated by the weight of societal expectations. Again, the following set of factors is not exhaustive, but it is helpful to highlight the factors below.

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Accountability

Expectations for system-wide improvements have often been matched by corresponding expectations of increased accountability (see most recently the policies associated with the "No Child Left Behind" legislation in the USA). A feature of developments in many societies has been a loss of confidence in traditional professions to meet societal expectations, and this has often been particularly pronounced in education. Increased pressures for accountability have become a common feature of education systems with a combination of centralised state control, buttressed by powerful inspectorates, and the introduction of decentralised management arrangements often accompanied by quasi-market forms of organisation. The consequence has been to subject schools, and particularly principals, to huge accountability pressures as leaders seek to meet the demands of both the state apparatus and the local market.

Resources

There is of course nothing new about schools lacking sufficient resources, and as is graphically illustrated by Bush and Oduro (2006), there are parts of the world where such shortages are so acute that the ability to meet even basic targets are apparently unrealisable. However, even in more generously resourced environments, under-funding of public education is likely to continue as global economic constraints place pressures on governments to contain public spending. The need for advanced economies to compete with low tax/low spend public welfare systems elsewhere in the world exerts a permanent downward pressure on public investment. The consequence for schools is that expectations of increased performance unlikely to be matched by corresponding increases in resources. Where resources are forthcoming, they are increasingly inclined to come from the private sector, with corresponding consequences for a loss of democratic control and the need to demonstrate return on investment (Whitfield, 2000).

Uncertainty

A feature of the post-modern world is an increasing sense of uncertainty (Lash and Urry, 1987; Beck, 1992, 2000). As education systems become ever more linked to economic imperatives and structures the environment in which schools function will increasingly resemble the rapid and volatile market that drives the commercial world. This generates uncertainty in a number of important respects. Most obviously the policy environment is likely to become increasingly unpredictable as governments seek solutions to rapidly changing economic and social conditions. The substantial restructuring that has characterised global education in recent years is likely to shift from reform to permanent revolution. At the same time, consensus about the core values of education, in so far as this has ever existed, is likely to diminish further. The rising expectations placed on schools, and discussed earlier in this paper, will increasingly challenge, and come into conflict with, those values that have traditionally dominated educational discourses (Bottery, 2000). Dissent will not be contained within a debate about means, but will increasingly embrace ends. Economic utilitarianism, aspirations for social justice and traditional educational values will all come into growing conflict. Principals have to navigate this uncertainty, working within their

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national policy context, whilst simultaneously trying to make sense of an environment in which less and less can be taken for granted.

Complexity

Finally, we are asking principals to step into a role bounded by ever-increasing complexity. The break-up of Fordist structures in many societies is already creating school organisations that are quite different to those that have gone before. This process of diversification (both in terms of organisation and ownership) is likely to continue apace, and is illustrated very clearly in the UK by the twin, and linked, initiatives associated with workforce reform (Department for Education and Skills, 2003) and the "Every Child Matters" agenda (Department for Education and Skills, 2004a). The changing role of "extended" schools (Department for Education and Skills, 2004b), and the increasing diversity of roles of those who work within them, is likely to make the task of those who lead such schools significantly different. Principals will increasingly be taking on responsibility for organisations that contain a diverse range of service professionals (and "para-professionals"), from a number of different agencies (health and social services as well as education), operate for long hours every day of the week, and may engage in much of their work "off-site" (either at community locations or in students' homes through online learning). In short, we are asking principals to take on the leadership of schools that are more diverse and more complex than has ever been the case. This will increasingly require school leaders to become leaders within their communities, as well as within their schools.

Beginning principalship – developing a research framework

All of these issues – especially when taken together – point to the enormous challenges expected of those who assume the role of principalship (Bottery, 2004). Indeed the challenges may seem almost insurmountable. At the heart of the problem is an expectations deficit that is never likely to disappear. We shall always want schools to deliver more than is realistic for them to do so. Political expediencies, fuelled by media hype, make this almost inevitable. This deficit is likely to worsen therefore as structural pressures push societal expectations inexorably upwards, whilst economic and other constraints ensure that the resources sufficient for the task are rarely available. At the same time, trust in those professionals charged with delivery appears also to be ebbing away. It is into this high expectation/low trust vortex that we expect new principals to step. As indicated earlier, there is already evidence of unwillingness on the part of many teachers to take on this role, a phenomenon that threatens to undermine even further the possibility of securing system-wide improvement.

It has been argued thus far that the positioning of schools, and the roles of school leaders, are best understood against a complex background of social, political and economic trends, operating both simultaneously and interdependently on a global, national and local scale. As has been indicated, there is strong evidence emerging that in some specific contexts the interplay of these factors as experienced by teachers is contributing to a growing crisis in the supply of potential school leaders. There is therefore a strong case for better understanding the phases within which teachers' careers develop as they make crucial decisions about whether or not to move towards, into and through principalship. Focusing the research spotlight on the early phase of

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principalship is thus crucial for more than one reason. First, it can reveal why certain teachers have followed a particular career path and opted for the principalship, thereby adding to the supply of principals. Second, it can also help clarify their early experiences in the role itself which have direct relevance for their immediate and longer-term development as principals, and which might also exert influence on their subsequent retention. Given demographic developments in many countries that point to principals taking on the role at younger ages, but potentially having to work until their full retirement age, then issues of retention and sustainability become crucial.

Contributions to this Special Issue point to the interconnectedness of the issues requiring further study and therefore the need to develop a research framework that is able to combine a robust conceptual and theoretical perspective relating to beginning principalship with a broad range of methodological approaches. It must also be capable of making connections between the apparently individualised decisions of beginning principals and the wider context within which these decisions are made. Detailed analysis of the various approaches contained in this Special Issue point to the need to develop a conceptual framework that seeks to link and integrate three core concepts – individual career trajectories, personal socialisation processes and developing professional identities and set these against a backdrop of external pressures and tensions discussed earlier in this paper. In setting out a rationale for focusing on these areas it is essential to recognise the interdependence of each with the other. While each factor may be studied in isolation, it is the iterative way in which each single factor both shapes, and is shaped by, the other factors that can help provide a comprehensive perspective on what beginning principals "feel, need and do" (Walker and Qian, 2006). This relationship is best illustrated by the overlapping circles presented in Figure 1 and their relationship to the background issues of pressures and tensions that will reflect a mix of global homogeneity and specific cultural context.

The concept of career trajectory refers to the historical sequence of past, present – and possible or intended future – roles and positions. Ball and Goodson (1985) distinguish two components of career and career trajectory – an objective, social element, influenced by economic and political conditions, and a subjective element, as seen and influenced by the individual. This distinction highlights an important tension between the influence of structural factors on career trajectories and the potential for individual agency in the shaping of career paths. As individuals' career trajectories develop powerful processes of learning take place and this highlights the need to recognise the importance of personal socialisation processes. In this Special Issue, Weindling and Dimmock (2006) draw on Merton's (1963) distinction between professional and organisational aspects of socialisation, whilst Crow's (2006) contribution adopts a similar distinction based on the work of Greenfield (1985). The former refers to the process of learning about a role or roles that develop through personal experiences of schools, teaching, and leadership, and from formal courses. In contrast, organisational socialisation comes from the learning and experiences gained from a particular role in a specific organisation. Identity is how we perceive ourselves – our self-image – in relation to specific contexts and roles in life and work (Giddens, 1991; Jenkins, 2004). Personal identity relates to how a person sees the private informal self; professional identity derives from their self-perception, their self-image, and their self-efficacy in relation to their work and career (Goodson and Walker, 1991). There may be tensions between self-image and social role. Identities are a product of both

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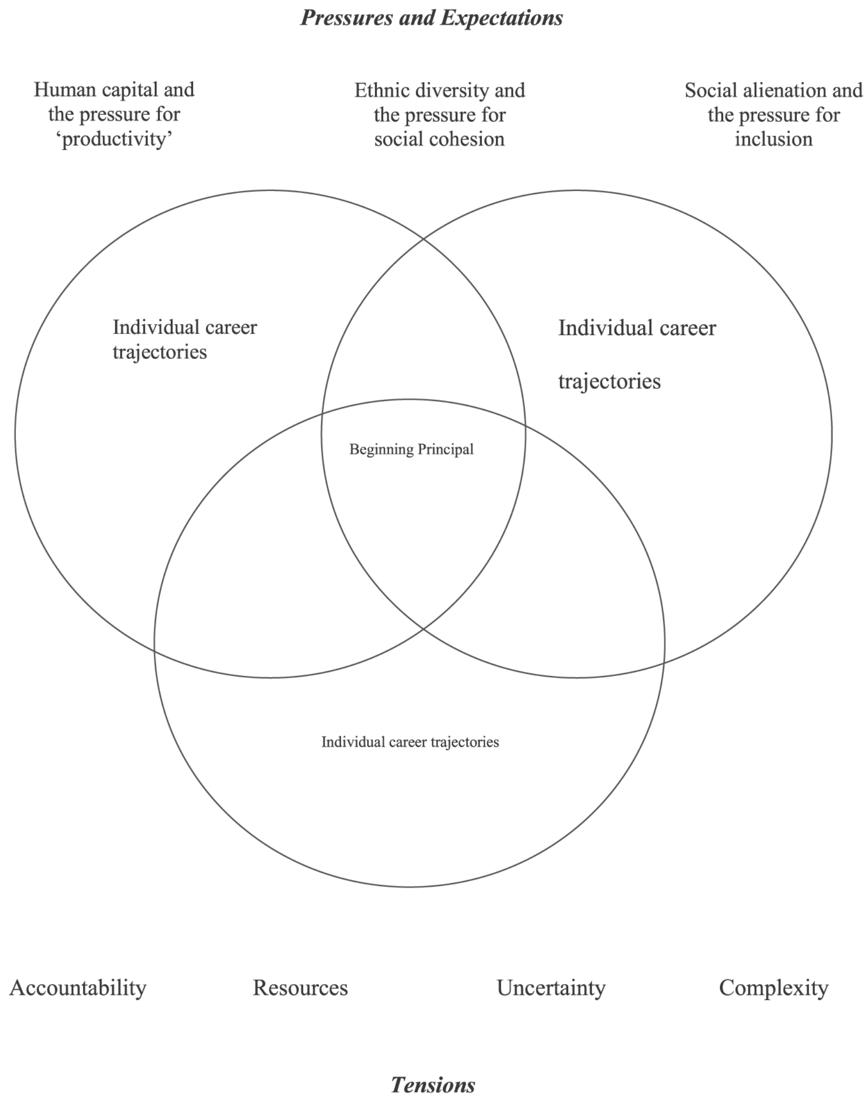

Figure 1.
A possible framework for researching the career trajectories of school leaders

structure and agency, and the interplay between them; they are in a constant state of flux, shifting and changing over time. Moreover, some argue (Holquist, 1990; Holland and Lave, 2001) that professional identities may be dialogic and multiple, that more than one identity may exist for different roles and situations. Socialisation processes help explain how identities are formed and re-formed over time.

Discussion

The studies in this Special Issue illustrate the nexus and interrelationships between the concepts of socialisation, professional identity and career trajectory, and provide a

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potential framework for developing a much richer understanding not only of beginning principalship, but of how that experience then develops as principals' careers unfold. Several of the papers highlight the need to understand the central role of socialisation processes as teachers move into and through their principalship. Teachers experience a range of professional socialisation processes both before and during their careers as teachers, but it is clear from the studies in this Special Issue how these become qualitatively different once the position of principal is assumed. Organisational socialisation processes come strongly to the fore as the organisation learns to adapt to the leader, but also as the leader learns to adapt to the organisation. This is when leaders must face the beginning principal's most difficult dilemma – "finding a balance between doing too much and too little" (Quong, 2006). Nor are principals free agents as they consider when, or to what extent, they should make their intervention. It is the pressures and tensions identified previously that provide the outer world (Cheung and Walker, 2006) within which beginning principals function. Principals are forced to reconcile competing and conflicting expectations that are generated both within and without the organisation. In each of these situations the institutional circumstances are unique – the expectations and anxieties of school stakeholders; the long shadow, for better or for worse, of the previous incumbent; and the context provided by levels of resourcing, local market conditions and the demands of the wider policy environment. There is no manual to provide an answer, while others can only offer advice – they cannot take responsibility.

What then is the relationship between these socialising factors and the professional identities of school leaders? Several of the contributions to this Special Issue highlight the role of school principals as "educational leaders" (Cheung and Walker, 2006) and leaders of learning communities (Sackney and Walker, 2006), but it is clear that there are tensions between the pursuit of these aspirations and the pressures of a performativity culture. To what extent are these tensions then influencing and shaping the professional identities of beginning principals? How are professional identities shaped by the transition from teacher to principal? Evidence from the studies in this Special Issue, and from the research they draw on, highlight that this transition is distinctive and decisive. But how do principals make sense of their move into "the hot seat"? To what extent do professional identities change and how far are such changes consonant with past aspirations as an educator? To what extent do the pressures to perform conflict with educational ideals? Are principals forced to surrender their identity as teacher when they assume the role, and identity, of leader? A number of previous studies (Gewirtz and Ball, 2000; Gewirtz, 2002) have highlighted the extent to which the pressures of policy centralisation, combined with operational decentralisation, have created tensions that have challenged the educational values of school leaders, and which in turn have presaged a "new managerialism" (Pollitt, 1992). Gewirtz (2002) acknowledges that this is not a crude cause and effect relationship, but argues that pressures and tensions within the system create conflicts that principals must confront:

> The shift in values and language associated with marketization – and the construction of the post-welfarist settlement more generally – is contested and struggled over. In trying to respond to pressures created by the market, headteachers [. . .] find themselves enmeshed in value conflicts and ethical dilemmas, as they are forced to rethink long held commitments (p. 49).

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Wright (2003) asserts that school leaders may have "second order" values (such as staff participation decision making) that can stand in contrast to the dominance of the culture of performance, but that they are unable to challenge "first-order" values. First-order values, in the form of system aims and outcomes, are determined elsewhere and reinforced by powerful control mechanisms that render them effectively unchallengeable. Second-order values may appear attractive, but they are cosmetic and superficial, restricting discussion to means rather than ends – the ends remain beyond debate. More recently Wright (2004) has argued that:

> ... principals are [not] necessarily unprincipled people, far from it, but [...] the system in which they have to operate stipulates the overall framework, values direction and often the detail of what they have to do (pp. 1-2).

If it is the case, as Wright (2001) has suggested, that systemic pressures and tensions identified earlier in this paper, inevitably produce "bastard leaders", it should come as no surprise that intensification of the physical and emotional pressure on school principals is resulting in a crisis of supply. However, the nature of this relationship is not so clear. The "outer world" described by Cheung and Walker (2006) may be powerful and unfriendly, and it may often challenge educational values that have placed a premium on the value and development of all students. However, as studies in this Special Issue (Quong, 2006) and elsewhere (Day *et al.*, 2000; Gold *et al.*, 2003) demonstrate, there are spaces within which school principals can assert their agency and can promote the values that underpin their identities as both educators and leaders of learning communities.

What is now required is to develop a better understanding of the link between principals' professional identities and their career trajectories. What is clear is that changing conditions are making the principal's role more challenging, and labour market evidence in some contexts points to it being correspondingly less attractive. This presents a major obstacle to system reform and improvement, as it seems likely that schools will find it increasingly difficult to either attract, or retain, high-quality leaders. In many cases these recruitment difficulties will be experienced most acutely in precisely those communities in greatest need. This is already the case in some contexts, and is likely to become increasingly apparent in others. All of this points to the need to better understand the career trajectories of teachers. This cannot be restricted to labour market data of demand and supply trends, vital as it is, but must extend beyond this to include a rich understanding of the factors that shape career trajectories and why. What is it that makes a teacher decide to move towards, into and through principalship? It is also vital to develop a better understanding of why many capable teachers choose *not* to take this path. The studies in this Special Issue highlight a particular need to deepen this understanding at the point when individuals assume the role of principal for the first time. This is the moment when school leaders really have to confront the difficult questions, but they often do so without the experience, the networks of support and the reservoirs of loyalty that more established principals can draw on. This can also be the point at which educational values are most tested by management imperatives and the pressures created by a culture focused on high stakes accountability and a permanent revolution of policy initiatives. Confronting such challenges, and the ethical dilemmas they generate, has always been, and always will be, one of the defining features of principalship (Begley, 2004;

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Law and Walker, 2004). However, if what we ask of those who take on the role is asking too much, then longer-term objectives for improvement are jeopardised. In recent years considerable emphasis has been placed on leadership at school level to drive and deliver improvement. The success of this approach necessitates creating realistic and sustainable career pathways for school leaders. If as a consequence of unrealistic or inappropriate expectations we burn principals out physically, or demoralise them professionally, whatever the desired system outcomes are, they are unlikely to be achieved. Contributions to this Special Issue highlight the need to develop a research framework capable of better illuminating the relationships between these complex factors and thereby having the potential to influence policy that not only seeks to develop beginning principals, but ensures that bright and capable teachers are enthusiastic about becoming beginning principals.

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