

SABBATICAL REPORT

Negotiating Identity and Role in Principalship: Experienced Principals Perspectives

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SABBATICAL The ten weeks sabbatical was taken over the 9 weeks of Term 1 2010 and the first week of Term 2, 2010.
KEY ACTIVITIES a) Personal rest and rejuvenation including travel within New Zealand and Victoria, Australia.
b) Commencement of doctoral studies (Ph.D) through Deakin University, Victoria, Australia.

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THE REPORT

In keeping with the research and study focus of the original sabbatical proposal the following report forms part of a formal PhD Proposal being submitted toward my confirmation colloquium to be held in early October 2010 at Deakin University, Geelong. As is the nature of doctoral work by research the original topic changed somewhat in the course of negotiation with the University and supervisors. However the main work still consisted of:

- Establishing a significant, viable, researchable problem in the area of educational leadership and more particularly principalship.
- Establishing a theoretical framework for the study
- Developing a comprehensive methodology and research design
- Commencing a comprehensive review of the literature
- Combining these components to form the substance of a formal proposal

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A. THE PROBLEM AND ITS SIGNIFICANCE

Working Title

Negotiating Identity and Role in Principalship: Experienced Principal Perspectives

Statement of the Problem

Setting the Scene

The decentralised schooling environment can prove formidable to those faced with navigating it. No more so than for those perceived to be the leadership linchpins commissioned with the task of administering schools that are at once communities of learning, multifaceted organizations, neighbourhood centres, and the province of political and societal power plays. On a daily basis the school principal traverses a range of roles marked by increasing complexity, responsibility, and accountability; roles shaped by forces very often external to the school and local community. At the same time they also bring something unique to those roles; their personal and professional identity, wrought in often very different crucibles. Both in deliberate and imperceptible ways these individuals negotiate the interplay of role and identity; negotiation that in turn shapes their place and practice. It is the exploration of this zone of negotiation that is the crux of this research project.

The saliency of closely researching educational leader identity and the ways in which it shapes and is shaped in the act of leading is not new but relatively under-represented in the field of educational leadership studies. As Peter Ribbins and Helen Gunter have observed, while much is written about the nature of effective leadership, too little research focuses on *leading*: “detailed and contextualized accounts of what individual leaders do and why they do it in a variety of specific circumstances, how and why others respond as they do, and with what outcomes”, and *leaders*: “what leaders are, why and by whom they are shaped into what they are, and how they become leaders” (2002, p.362).

The Problem

The purpose of this study is to probe how experienced principals negotiate the complex interplay of personal and professional identity and the role of principalship shaped in particular by political-pedagogical discourses and salient social forces. It aims to explore the relationship between relevant concepts like ‘identity’, what counts as ‘professional’ in professional identity, the role of the context in professional identity formation, and how principals personalise the role, that is, how they live with and within the role. It seeks to determine how the rich experiences inherent in personal and professional histories are used for meaning-making in the complex dynamics of leading. As John Dewey persuasively put it:

“As an individual passes from one situation to another, his world, his environment, expands or contracts. He does not find himself living in another world but in a different part or aspect of one and the same world. What he has learned in the way of knowledge and skill in one situation becomes an instrument of understanding and dealing effectively with situations which follow. The process goes on as life and learning continue.”
(Dewey, 1938, p.46).

In sum, the problem this thesis sets out to illuminate is ‘what are the stories experienced principals live by as they negotiate the interface between role and identity in their principalship?’

The first subproblem

Firstly, the research will undertake to identify and describe the significant ideas and forces that have of recent times shaped the role of principalship in New Zealand Schools.

First Sub-Question

What are considered the significant ideas, discourses and forces that shape the role of principalship?

The second subproblem

Secondly, the research will seek to identify the salient influences that have shaped the professional identity of individual principals.

Second Sub-Question

What are considered as critical life incidents, core values/ethics, and guiding philosophies that shape the personal and professional identity of individual principals?

The third subproblem

Thirdly, the research will attempt to ascertain the nature of the process of negotiation that occurs at the interface of identity and role.

Third Sub-Question

What is the nature of the process of negotiation that occurs at the interface of identity and role?

The fourth subproblem

Fourthly, the research will describe the dispositions and aptitudes principals develop and exercise (and which enable them) in this process of negotiation.

Fourth Sub-Question

What are the values, dispositions and capabilities considered critical in negotiating the interface between identity and role?

Delimitations

The scope of the study will be limited to the perceptions of the principals and will not attempt to determine the direct or indirect effects of the negotiation process on their professional colleagues, governance groups, employers or agencies of the state. In addition the study will not attempt to link principal practice to the likes of staff professional development, classroom pedagogical practice or student achievement and other elements normally associated with focus on school improvement.

Definition of Terms

Principal

The principal is the recognised professional leader of a school. By way of position and function he or she engages in a range of activities associated with leadership, management, pedagogy, and curriculum. He or she relates with a wide range of individuals, groups and agencies in order to bring about the best of outcomes for all the pupils of the school. The principal has formal authority in terms of the school's activities, personnel, programmes and outcomes.

Experienced

In terms of the proposed study 'experienced' will be taken to refer to principals who have served as principal either in their present school, or as principal in more than one school, with combined service of at least five years. By doing this it is anticipated that the principals will be, "...beyond the 'initiation' phase of their career and more likely to be in the 'developmental', 'autonomous' and 'advancement' phases" (Day & Bakioglu, 1996 in Piggot-Irvine, 2003). This criteria corresponds to that used by the New Zealand Ministry of Education in determining entry to professional development programmes for experienced principals (i.e. Experienced Principals Development Project 2009-2010).

Principalship

Principalship refers to the sphere that encompasses the special blend of principal role and identity and resulting practices and interactions.

Negotiation

Within this inquiry this term will be engaged in two ways:

- The internal and/or external *process*, normally between two or more people or parties, of dialogue, discussion, debate, conferring, consulting, and bargaining, that has as its intent: agreement, resolving of issues, and forging of consensus.
- The process of navigating, traversing, or dealing with a given subject or object. In terms of this study such a subject or object refers to the 'landscape' of principalship. The use of 'landscape' as a metaphor for the immensely complex nature of principalship is particularly well suited to this study. It is one that Clandinin and Connelly have so successfully adopted as they sought to describe the narratively constructed professional knowledge domain of teachers (Connelly & Clandinin, 1999, p.2).

Role

A role is a complex set of expectations and behaviours that make up what one does, and should do, as a certain type of actor in a particular setting (Miles & Huberman, 1994, p.122). In terms of this study these expectations and behaviours are those relating to the blend of leadership, management, and administration that principals undertake.

Identity

No succinct definition for such a profound and fluid concept is available or entirely feasible but broadly identity refers to the sum of what constitutes one's perception of self. Psychologically it relates to a person's mental model of him or herself; what constitutes individuality and the human capacity for awareness of self. Sociological perspectives give weight to the notion of identity formation as a process in which a person negotiates with society at large regarding the meaning of his or her identity.

Significance of the Study

In undertaking such educational research I aim to provide a:

"...critical enquiry aimed at informing educational judgements and decisions in order to improve educational action. This is the kind of value-laden research that should have immediate relevance to teachers and policy-makers, and is itself educational because of its stated intention to 'inform'. It is the kind of research in education that is carried out by educationalists." (Bassey, 1999, p.39)

The primary significance of the study lies in the nature of its focus; the examining of the nature of the interplay of role and identity inherent in principalship, and the ways principals contextualise and recontextualise, contend, and grow through living the process of negotiating these phenomena. Its import is in the relating of principals' understandings of themselves, their experiences, and the negotiated world in which they live and lead. In other words, "The iterative and interactive

connection between experience, reflection, interpretation of experience, and the construction of meaning is critical for learning and development” (Restine, 1997, p.253). In keeping with this focus the study will be conducted from an interpretive qualitative methodological perspective using a grounded theory approach.

In light of the above it is considered that the study has the potential to provide:

- i. Educational leadership practitioners and researchers with valuable insights into how principals process issues central to the negotiation of their roles and identity within a well established decentralised schooling system.
- ii. Information that may bear consideration by policy makers developing, and agencies implementing, the likes of principal development programmes. Such programmes tend to attach particular weight to the practical concerns of pedagogical leadership and effective organizational administration that aim to bring school improvement. Though of vital importance, there perhaps needs to be increased exploration and conceptual framing of the often nebulous but fundamental processes of contextualization and recontextualization encountered and traversed by principals.
- iii. Use of the descriptor ‘zone of negotiation’ as a reference point for possible theorizing and further research.

B. A THEORETICAL FRAMEWORK

Conceptual Approach

The work of Helen Gunter and Peter Ribbins (2005; 2002) in creating a typology of knowledge domains as relating to research in the field of educational leadership is most useful. The typology consists of two dimensions that form a matrix of sorts. The first dimension, described as a multi-level framework, consists of five lenses for focusing the purpose of research; technical, illuminative, critical, practical, and positional. This research project will be primarily illuminative in nature as it sets out to “...interpret the meaning of practice regarding how and why activity and actions take place”. However it will also contain a critical dimension in that it “...asks questions about power relationships within and external to activity and actions” (Gunter, 2005, p.166).

The second dimension relates to what are termed knowledge domains. This proposed study appears to span the ‘understanding meanings’ and understanding experiences’ quadrants (2005, p.170). The fit within the first is in terms of the study’s ‘descriptive’ approach which has to do with challenging and developing understandings of activity and action; in this case of individual leaders. It lays importance with knowledge in terms of meaning and purposes integral to how principalship is conceptualised. The fit within the latter quadrant is in terms of the study’s ‘humanistic’ approach that focuses on gathering and using experiences to improve practice within the broader ‘understanding experiences’ quadrant. Such knowledge enables principals “...to both describe their work and their career pathway, and inter-relate this over time within context (organization, home and policy)” (Gunter, 2005, p.171).

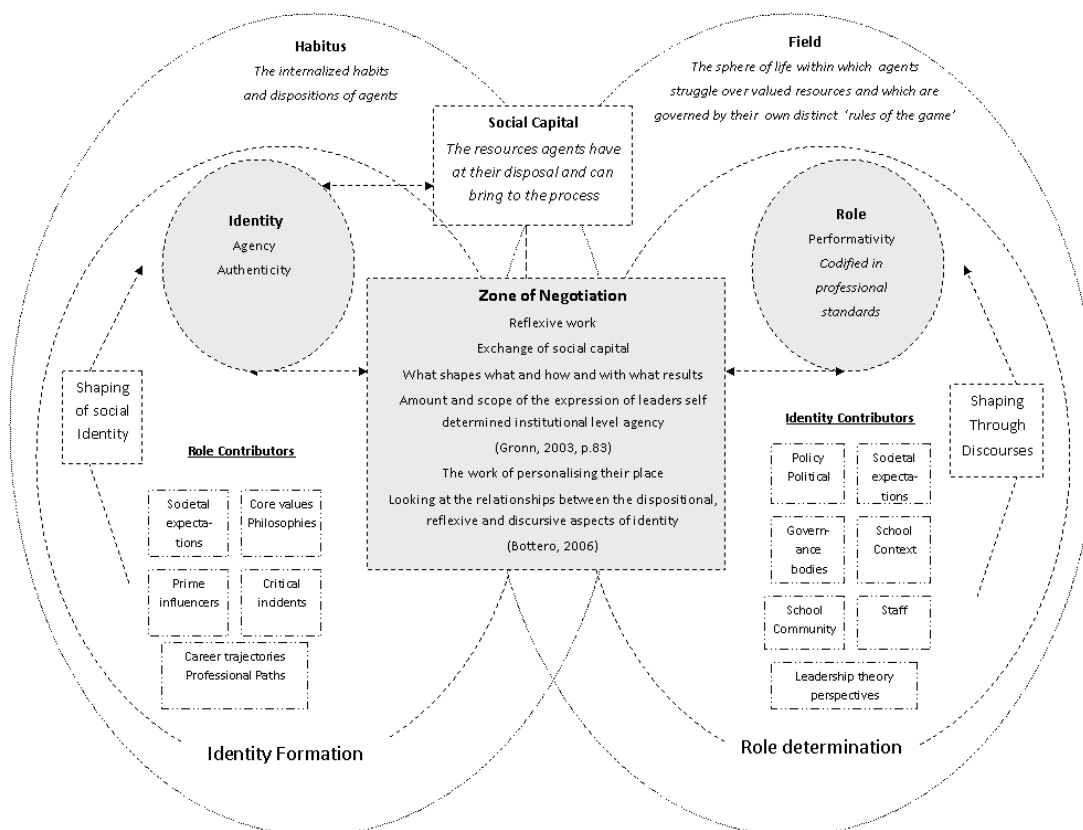
Having this conceptual grounding enables me as researcher to be focused in terms of many aspects of the study. It provides me with a discerning eye in towards theoretical currents and the direction other research projects are coming from, aids in the effective design of the research especially methodologically, and positioning the work in terms of its significance to the field.

Conceptual Map

At this early stage in the life of this research project it has been considered helpful to establish my own conceptual map of the 'landscape' that illustrates the scope of the study. Such mapping allows for changing perspectives and emphases, with elements being able to be incorporated or eliminated as the study progresses.

The key facets of the conceptual map (Figure 1 below) are those that are alluded to within the study's working title, the problem, and definitions outlined above, namely; identity formation, role determination, and the zone of negotiation. The inclusion of *Habitus*, *Field*, *Logistics of practice*, and *Social capital* refer to some of the theoretical concepts being adopted, terms most closely associated with Pierre Bourdieu's social theories. The perforated lines and arrows are indicative of the fluid nature of the elements, relationships and terms used within each domain (e.g. agency, performativity, reflexivity).

Figure 1: Conceptual Map



Theoretical Framework

As is reflected in the conceptual map (Figure 1), theoretical underpinnings are already emerging that are considered to be beneficial in understanding the concepts that the study sets out to explore. Theories are "...attempts to explain events, forces, materials, ideas, or behaviour in a comprehensive manner", a way of seeing "...relationships among seemingly isolated phenomena", and understanding "...how one type of change in an environment leads to other changes" (Schaefer, 2005, p.8). As O'Brien comments in relation to social theory, theory acts as a sort of kaleidoscope. By shifting theoretical perspectives the world under investigation also changes shape (1993, pp.10-11).

In order to help contextualise the problem this study sets out to examine a theoretical framework is required so that the phenomena can be critically understood and so what is unknown, or emerges in the research process, might be organised (Silverman, 2005, p.4). Effective theories have both explanatory and predictive power. As the focus of the study has gradually taken shape some effective theoretical perspectives, primarily sociological in nature, have started making sense of the concepts being explored. These come from the work of the French sociologist Pierre Bourdieu, English educational sociologist Basil Bernstein, and the ideas that evolved around social identity associated with people such as Charles Colley, George Herbert Mead, Erving Goffman, and of late, Jane Loevinger, and from a different perspective, Anthony Giddens. As well as considering these sociological theorists early exploratory work has commenced which looks at psychological perspectives on identity from people such as Erik Erikson and Lawrence Kohlberg.

Bourdieu

In framing this study Bourdieu's social theories and especially his concepts of *habitus* and *social capital* and his position on *field* and *reflexivity* have made sense of many of the notions and elements associated with the research problem. A number of highly regarded researchers and writers see his ideas as providing a platform for exploring aspects of not only broad educational issues but more specifically issues associated with educational administration and leadership (Bottero, 2006; Fitz, 1999; Gunter, 2002, 2003b; Harker, Mahar, & Wilkes, 1990; Lingard & Christie, 2003; Thomson, 2003).

Bob Lingard and Pam Christie (2003) contend that his concepts of *habitus* and *field* when applied to the context of educational leadership studies "...enable us to move beyond trait, situational and transformational leadership theories, emphasizing instead the recursive relationship between agency (individual leader habitus) and structure (field) in the broader social context" (p.319). It is Bourdieu's special position on this 'recursive relationship' that illuminates the hub of this study termed the 'zone of negotiation'. As Lingard and Christie go on to explain, "Habitus enables us to talk about the person of the leader ...in relation to specific social structures and embodied dispositions" while "Field enables us to talk about the context of leadership, in this case the school, as 'structured social space' with its own properties and power relations, overlapping and interrelating with economic, power, political and other fields" (pp.319-320). 'Habitus' as a dispositional form of identity brings considerable clarity in terms of how subproblem 2 (Influences that have shaped the professional identity of principals) and 4 (Dispositions and aptitudes principals develop and exercise in the process of negotiation) relate to the 'Field' orientated subproblem 1 (Significant ideas and forces that shape the principal's role). Part of the link between habitus and field is encapsulated in Bourdieu's concepts of *position* and *logistics of practice*. Position, as being individual and networked interactions, correlates with what this study considers as role, which, according to his theory, is in turn closely related to institutional and political structures and their discourses. Logistics of practice is habitus in action and in terms of this study correlates with the act of negotiating. Within this reflexive interplay of dispositional identity and role (position) within the

field, agents trade in capital; primarily *social capital*. Ball (2004) defines Bourdieu's social capital as "...the aggregate of the actual or potential resources which are linked to possession of a durable network of more or less institutionalized relationships" (p.21).

The 'Intellectual biography' method to be used in this thesis will seek to draw upon the rich educational leadership habitus that "builds upon prior dispositions learned through the long apprenticeship of school and university and ...the dispositional product of the field of educational management and leadership" (Bottero, 2006, p.9). Bourdieu's theorising enables the professional biographies of the principals in this study to be understood as academic-practitioner habitus (Gunter 2002).

Bernstein

Bernstein brought profound insights to many aspects of sociological understanding, especially in the field of education, particularly his theory of elaborated and restricted language code. However in terms of this study it is his ideas around discourse and his way of understanding 'inwardness' and the deep structures of the self that attention is paid. Though not the central concern of this study his work on discourse is most helpful in grasping the complex ways in which principalship is shaped by dominant message systems be they political-policy, philosophical-religious or arising from other powerful societal, economic positions.

In comparison to his extensive work around discourse Bernstein's work around identity in his later work (1996, 2000) appears to not be as well developed. Drawing inspiration chiefly from Durkheim's ideas of the sacred and profane, identity may be viewed as ways in which "...order (and sometimes disorder) internal to the individual was related to and resulted from external orderings—both *discursive* orderings and the socially structured relationships in which they were embedded" (in Beck, 2002, p.618). Bernstein considered the sacred of the individual's inner identity coexisted with the profane of setting. This means that a principal with a deep seated belief in collaborative decision-making not only has to contend with 'profane' micro politics amongst the staff but by the very act of negotiating he or she is implicated to some extent in that political game.

Social Identity

The third set of theoretical perspectives considered important in understanding the nature of the problem being addressed in this thesis come primarily from the sociological and social anthropological theories of identity. The main premise appears to be that individual and collective identity can both be understood using the same model, as 'internal' and 'external' processes. Sociologists and psychologists alike have expressed interest in how the individual develops and modifies the sense of self as result of social interaction with many notable thinkers providing insights as to the shaping of self and how this relates to societal structures. Cooley coined the phrase *looking-glass self*: "... to emphasise that the self is the product of our social interactions with other people" (in Schaefer, 2005, p.84), while Mead used the term *significant others*: "... to refer to those individuals who are most important in the development of the self (in Schaefer, 2005, p.86). Later Goffman used the analogy of dramatic acting, his *dramaturgical* perspective, to reflect the "...subtle yet critical ways in which we learn to present ourselves socially" (in Schaefer, 2005, p.86).

I also intend looking at the work of Tajfel credited by some to have coined the term 'social identity' as a means of specifying "...how beliefs about the nature of relations between groups (status, stability, permeability, legitimacy) influence the way that individuals or groups pursue positive social identity" (in Hogg & Terry, 2001, p.2). Such understandings shed considerable light on the nature of identity formation and more particularly on the interaction of agency and structure central to this study. However in many ways I consider the work of Bourdieu provides a more extensive perspective with his development of the habitus.

I have yet to read on the important link between life experience and social identity which will be important in terms of appreciating fully aspects that may emerge through the biographies. To this end I plan on looking at Erikson's life phase theory with its focus on formative crisis or turning points and Kohlberg's ideas around stages of development and the seeking of consistency between thought and action. I am particularly interested in following through on Loevinger's ideas that identity development occurs through a constant process of involvement in active exchange with the environment. She suggests for instance that through active exchange, individuals construct meanings, strive for competence, and protect themselves from changes that threaten to undermine the assumptions or inner logic with which the self is maintained (in Restine, 1997, p.254). These ideas have considerable coherence with the conceptual frameworks building in this study.

Appendix 1 sets out a preliminary list of sources that I have and am still working through in order to establish understandings in terms of theoretical perspectives and associated concepts and their often complex language patterns.

C. REVIEW OF THE LITERATURE: PRELIMINARY EXAMINATION OF SOURCES

Approach to the Review of Literature

The review in essence is an ongoing dialogue with the extant literature and experts within the scope of the research that contributes to understanding the central problem and developing arguments while showing that gaps in available knowledge are evident. The literature need not only come from the immediate field of educational management as the examination of literature from divergent fields can yield different perspectives, challenge assumptions, and shed light on similar problems encountered in other contexts.

Purposes

The purposes are varied but all relate in some way to clarifying and building direction to the inquiry. Firstly, it will locate the research problem within a theoretical framework and review the underlying theory. Secondly it will explore and critique the salient work and perspectives of key thinkers and researchers along with exemplary studies (both supportive and divergent) so as to show their connection with the focus of inquiry, possible limitations, and where new knowledge emerges. Thirdly, it will disclose relevant methodologies and theoretical frameworks useful for the research project.

Approach

It is anticipated that this exploration and critique will follow a progressive coherence approach working from general to specific issues, from secondary to primary source material. This will be arranged under three key sections as outlined by Hart (1998, p.189).

Summary of existing work on the topic

This will include the different ways in which the topic has been studied (methods and methodology) and the issues different authors have highlighted as a result of their work. It will be important to identify the different ways key terms and concepts have been defined or used.

Critical evaluation of previous work

This involves assessing the methodologies and methods that have been employed previously to study the topic and evaluating the relative strengths and weaknesses of the literature. The key thing will be to make visible the map of methodological assumptions in the literature.

Some general and specific conclusions about work done to date on the topic

This section will draw general conclusions about the overall direction of work on the topic in relation to earlier more foundational work. Specifically there will be an identifying of gaps, silences, fallacies and failures in previous work in order to show the legitimacy and contribution of my own study and its approach.

Context of the Study and Relevant Research: A Preliminary Examination

It will be essential for the study, particularly in terms of answering the first subproblem, that there be a comprehensive analysis of the literature that sheds light on the context associated with principalship, and most importantly principalship as a defined role shaped in particular by dominant societal, political, and economical discourses and drivers. National and global, historical and current, functional and critical perspectives will be sought so as to richly describe the milieu in which the process of identity/role negotiation takes place.

Appendix 2 sets out a preliminary list of sources that I have read (and currently synthesizing in written form) in order to establish understandings in terms of the milieu associated with principalship from national and global, functional and critical perspectives.

Appendix 4 is a sample of an early draft examining certain aspects of the context of principalship relating to subproblem 1.

The most invaluable literature source is undoubtedly that of other researchers. Primary source material sheds light on so many things, from theoretical underpinnings through to research design, contextual insights to methods of analysis, from fascinating findings to a rich source of bibliographic signposts. It is time consuming work that can lead to dead ends or verdant fields. The work of Richard Notman and Annie Henry (2009), and Laurie Thew (2002) are some of a few New Zealand based studies that have some relevance to my conceptual framework, along with some very strong research projects from other anglo-orientated nations. Most notable of these are Jetter (2010), Loader (1997) and McGough (2003) from the United States, Jones from the United Kingdom (2008) and Sugrue and Furlong in Ireland (2002) with a fascinating study entitled “The cosmologies of Irish primary principals' identities: between the modern and the postmodern?”.

The literature pertaining to contextual factors and relevant research will be used in a variety of ways in the thesis. Firstly, within the introductory section where it will be used in painting a backdrop to the problem and its significance. Secondly it will be threaded into the fabric of the theoretical framework where this material will ground the theory clarifying the various elements/concepts. Thirdly, it will be used to support the rationale for the methodological approach taken. Finally, in the discussion of the findings comparisons and contrast will be made between the literature and the emerging findings.

Appendix 3 sets out a preliminary list of sources that I am working through in terms of related research studies that have examined the concepts inherent in my conceptual framework.

D. METHODOLOGICAL CONSIDERATIONS

Qualitative Methodological Approach

Morrison (2007, p.20) helpfully outlines four methodological paradigms used in the field of educational research. They are *Positivism / Empiricism*: “where it is accepted that facts can be collected about the world and it is possible to develop correct methods for understanding educational processes, relations and institutions”, *Phenomenology* as a form of *interpretivism*: “where the emphasis is placed on the way human beings give meaning to their lives; reasons are accepted as legitimate causes of human behaviour; and agential perspectives are prioritised”, *Critical Theory*: “where it is accepted that values are central to all research activities ...and the researcher does not adopt a neutral stance in relation to the world”, and *Postmodernism*: “which rejects universalising modes of thought and global narratives; understands knowledge as localised”.

As this study proposes to be exploratory and descriptive in nature, examining how agency interacts with structure, and where the researcher is prepared to be immersed in the complexity of the situation and interactions with the participants, a qualitative interpretive-phenomenological approach to methodology is considered most appropriate (Cohen, Manion, & Morrison, 2000; Leedy & Ormrod, 2005). This methodological perspective “...highlights the lived experience of situationally embedded real-world actors” as well as recognising that such actors are “...bounded in the particulars of time and space within which organization members negotiate meaningful action” (Gronn & Ribbins, 1996, p.455). It is this very ‘negotiation’ that is the phenomena in focus. Gronn and Ribbins go on to say,

“The relationship between the individual and context is both implicative and reciprocal: at the same time as individuals construct shared symbolic contexts in their manifold social transactions and exchanges, they are confined by the very linguistic limits imposed by their intersubjectively shared meanings and motives.” (1996, p.456).

Rationale for a Qualitative Methodological Approach

The use of this research paradigm is consistent with the notion that in making meaning of ‘the lived experience’ of people, in this case people vitally involved in the leading and administering of schools, researchers are not so much interested in quantifying effective processes as they are in giving voice to “...‘perceptions, assumptions, prejudgments, presuppositions’ and for connecting those meanings to the *social world* around them” (Miles & Huberman, 1994, p.10). It stresses that human experience is “...extricably embedded in the lived world of action and meaning” (Dunlop, 2005, p.1). Unlike other approaches, it allows more explicit recognition to axiological considerations, where beliefs and values are made explicit by the researcher so that respondents and readers know the context in which the research is conducted and these have been exposed to critical examination (Klenke, 2008, p.17). As Creswell puts it, qualitative approaches recognize the impact of the researcher’s values and through reflexivity seek to actively report the values and biases of the researcher as well as the value nature of data gathered (Creswell, 1994).

Some other features of this interpretivist qualitative approach that are most salient to this study are: Firstly, the perspectives of the participants are of central concern with the aim being to “...investigate ‘from the inside’ through a process of *verstehen* or empathetic understanding” (Morrison, 2007, p.27). Secondly, attention is paid to ‘rich’ and ‘deep’ description of persons, situations (contexts), events, interactions, and observed behaviours (Klenke, 2008, p.9). Thirdly, thorough consideration is given to the holistic picture; “understand(ing) the data in a broader educational, social and historic context” (Morrison, 2007, p.27). Fourthly, it emphasises openness to emerging explanations, serendipitous findings, and fresh perspectives through textual analysis rather than reliance on prior structures and limiting theoretical frameworks. Fifthly, it allows for, with appropriate methods and analysis, the stories of research participants to emerge and be heard, not

reconstituted "...in a language and culture determined by the researcher" (Bishop, 1997, p.29). Sixthly, it ensures that unlike so many leadership studies the principal is not depicted 'in monochrome' (Gronn & Ribbins, 1996, p.459).

Implications of a Qualitative Methodological Approach

A commitment to qualitative research brings with it four significant implications. Firstly, in philosophical terms it means giving the multiple perspectives that are held and expressed by different individuals' equal validity. As alluded to above this requires the researcher to ensure the voice of the participants comes through with clarity, while needing to interpret and make sense of what is under investigation. Secondly, it requires vigilance in both avoiding researcher bias, which can occur when the interpreting of data is influenced by the researcher's expectations concerning the study's outcomes, and awareness of participant reactivity; the tendency of some participants to react differently when what they relate forms part of a research report. Thirdly, it requires skill on the part of the researcher in: interview strategies and other data collection methods, handling and finding order with often huge amounts of data, looking for and separating important information from unimportant details in what is collected, and the reformulation of questions as the study proceeds in light of unfolding understanding of the phenomenon (Leedy & Ormrod, 2005, p.133-134). Lastly, there are implications in regards to the choice of methods, design and tools which are now addressed.

Grounded Theory

The methodology being used in this study is Grounded theory (sometimes referred to as the constant comparative method). Its origins lie with sociologists Glaser and Strauss (Lewis-Beck, Bryman, & Liao, 2004, p.180) and their qualitative research amongst dying hospice patients in California during the mid- 1960's. Along with their research publications they wrote of the methodological approach developed in their now seminal work "The Discovery of Grounded Theory" (1967). Despite Glaser and Strauss later taking different positions over the formalisation of the stages of analysis with Glaser emphasizing induction or emergence and the researcher's creativity while Strauss, along with Corbin (2008; 1998), stressing validation criteria and a systematic approach, Grounded theory has been widely adopted in many fields of social research including education (Leedy & Ormrod, 2005, p.140).

This grounded, posteriori inductive, context-sensitive scheme (Schwandt, 2001, p.26) consists of a systematic set of procedures that emphasizes the generation of theory from data; a process that develops theory from the conceptualization of data, rather than the actual data. Unlike descriptive research, Grounded theory highlights the generating of concepts that are abstract of context. It sees the researcher engaging with the authentic responses and resulting textual treasures of research participants. Following a pattern of analysis they work with the data in ways that generate codes, concepts, categories and theories; comparing, contrasting, aggregating, ordering, establishing links and relationships, and lastly speculating on tentative explanations.

The collection and analysis of data are deliberately combined with initial data analysis used in the continual shaping of data collection in order to effect the 'groundedness' of the emerging theory. This constant comparative approach is designed to give opportunity for increasing 'saturation' of recurring categories, assist in providing follow-up procedures in regards to unanticipated results, and increase insights and clarify the parameters of the emerging theory.

In order that the analysis to be based in the data and the theory that emerges from the study is derived and 'grounded' in that data, it is generally agreed that initial data collection and preliminary analyses should come prior to the review and incorporation of previous literature (Leedy & Ormrod, 2005, p.140). This is so that pre-existing constructs located in previous research literature do not

influence the analysis and/or the subsequent formation of the theory and if existing theoretical constructs are utilized, they must be justified in the data.

Research Method

A method is a strategy of inquiry which moves from the underlying philosophical assumptions to research design and data collection. In keeping with an interpretive approach the method to be utilised in this study needs to be conducive to "...exploring the meanings, variations, and perceptual experiences of phenomena" seeking to "capture their holistic or interconnected nature" (Crabtree & Miller, 1999, p.6). This will have implications not only in terms of the research design (p.27) but most particularly in terms of establishing reliability and validity of method and the analysis and presentation of the narrative data generated.

Nature of the Method

The method to be adopted in this study is what is variously termed 'situated portrayal' (Gronn & Ribbins, 1996), 'narrative life history' (Connelly & Clandinin, 1999), or 'intellectual history' (Gunter, 2003a). This approach is well placed to capture the complexity and detail related to principals' understandings around the concepts and practices of negotiating role and identity. For consistency throughout the study the method shall be described as 'intellectual biography'. In order to build these biographies it is planned that a variety of in-depth interviews will be employed from semi-structured through to unstructured in nature. These in-depth interviews will be inductive, constructive, subjective and generative in nature (LeCompte & Preissle, 1993, pp.40-46).

Avalio and Bass (1988) have noted a failure on the part of leadership researchers to utilize the entire range of methodological approaches in studying leaders, including biography. Connelly and Clandinin's work over quarter of a century researching teacher lives is of note (Clandinin & Connelly, 1995; Connelly & Clandinin, 1990, 1999) as is that of Gunter (Gunter, 2006). Gunter (2003a), whose work with intellectual biography with those in tertiary educational administration and leadership is most enlightening, sees this approach as giving prominence to "agency (through the physical, cognitive, affective, and spiritual dimensions), to activity, and to structures, through the power dimensions that enable, shape, and stifle activity" (p.336).

As with Gunter, Gronn and Ribbins (1996) also judge intellectual biography well suited in connecting "...agency and structure and macro-, meso- and micro-levels of analysis" (p.454). They go onto outline three important ways in which such biographies can facilitate theorizing about leadership. Firstly they may be inspected for evidence of the development of learning of leadership attributes ,secondly they offer insight as to the ends to which leaders have directed their attributes throughout their careers within the shifting demands on, and options available to, them, and thirdly comparative analyses of career paths can answer broad institutional-level questions (p.464). Elsewhere Gronn elaborates on *career* being used as an analytical construct as a means of synthesizing biographical and institutional perspectives on leadership (Gronn, 2003). This method will be carried out through the use of in-depth interviewing.

In-depth Interviews

In-depth Interviews (semi- and unstructured) are shared, negotiated and dynamic social interactions (Bogdan & Biklen, 2007, p.104), in which the both the interviewer and interviewee have active, reflexive, and constitutive roles in the process of knowledge construction (Burns, 2000; M. Q. Patton & Westby, 1992, p.11). The style is conversational, flexible and fluid, with purpose achieved through active engagement by interviewer and interviewee around relevant issues, topics and experiences during the interview itself. As mentioned earlier such interviewing techniques have their

roots in a range of theoretical and epistemological traditions, “all of which give some privilege to the accounts of social actors, agents, individuals, or subjects” (Mason, 2002, p.225).

Although normally associated with comprehensive case studies that also include observations and analysis of documentation (Burns, 2000), in-depth interviews are able to provide a close understanding of the participants’ knowledge, understandings, interpretations, experiences, and interactions; giving them a ‘voice’ (Leedy & Ormrod, 2005). Such interviewing implies an egalitarian relationship between the interviewer and interviewee where “...the interviewer attempts to retrieve the interviewee’s world by understanding their perspective in a language that is natural to them” (Klenke, 2008, p.127). The in-depth interview is personal and intimate, with an emphasis on “depth, detail, vividness, and nuance” (Rubin & Rubin, 1995, p.76).

Semi-structured interviews are “...guided, concentrated, focused, and open-ended communication events that are co-created by the investigator and interviewee(s)” (Crabtree & Miller, 1999, p.19), with the questions, probes, and prompts written in the form of a flexible interview guide (M. Patton, 1980). The questions in the semi-structured interview are not predetermined to the extent that one would find in a questionnaire. Rather, they develop around the critical themes arising from the study’s aims, the literature, and the emerging ideas from the data, with the content being adapted to each situation dependent upon response and direction (Leedy & Ormrod, 2005). The objective of the interviewer gathering evidence must be to evoke extensive and naturally expressed information because rich texture and contextualization is necessary if an adequate critique is to be mounted (Stenhouse, 1978 in Wellington, 2000, p.83).

Unstructured interviews are more akin to guided everyday conversation. The researcher tends to have one or more topic areas that they want to glean from the ‘insider’. However unlike a more semi-structured interview there are generally no written questions (Crabtree & Miller, 1999, p.19). Kvale (1996, p.145) suggests six criteria for assessing the quality of an interview: extent of spontaneous, rich answers, longer responses than questions, degree to which interviewer follows up and clarifies, interpretation goes on during the interview, each partner attempts to verify his or her interpretations, and interview is story in itself; it is self-communicating.

Perceived Advantages

There are a number of perceived advantages to the use of in-depth interviews. Firstly, they allow respondents to use their “unique way of defining the world” (Denzin, 1971, p.125). Secondly, they assume that no fixed sequence of questions is suitable to all respondents. Thirdly, they allow respondents to raise important issues not contained in the schedule. Fourthly, they enable people to talk about something in detail and depth. The meanings behind an action may be revealed as the interviewee is able to speak for themselves with little direction from interviewer. Fifthly, they allow for complex questions and issues can be discussed and clarified. The interviewer can probe areas suggested by the respondent’s answers, picking up information that had either not occurred to the interviewer or of which the interviewer had no prior knowledge. Sixthly, in-depth interviews will “more clearly reveal the existing opinions of the interviewee in the context of a world-view than will a traditional interview where the interviewer’s role is confined to that of question-maker and recorder” (Tripp, 1983, p.34 in Bishop, 1997, p.33). Lastly, they are relatively easy to record for transcribing at a later stage.

Possible Shortcomings

However in-depth interviews can have limitations and pose particular challenges that need to be taken into consideration and worked with. Firstly, respondents can possess different interactional roles from the interviewer. Secondly, there can be problems of ‘self-presentation’, especially in the early stages of the interview (Denzin, 1971, pp.133-138). Thirdly, it relies on the interviewer having

particular questioning skill. Fourthly, the depth of qualitative information may be difficult to analyse (for example, deciding what is and is not relevant). Fifthly, the interview itself can be a strategy controlled by the researcher and repressive of the position of the informant/participant (Bishop, 1997, p.31). Sixthly, it relies on a high degree of articulacy on the part of respondents. Finally, in-depth interviewing can be particularly time-consuming including making arrangements, interviewing, transcription, and analysis (Burns, 2000).

Method Reliability (Dependability)

Positivist approaches to research emphasize reliability as being a synonym for consistency, accuracy, and replicability. In the context of qualitative research what will be looked for are common themes that emerge which in occurring over and over will verify the data.

The ensuring of reliability in the case of semi-structured interviews lies in the careful formulation of the key questions and any sub-questions that seek further elucidation. Particular care must be taken to maintain each question's consistency of meaning for each interviewee, and needing accurately to reflect the phenomenon being researched (Cohen, et al., 2000). Reliability can be further helped by a healthy but balanced rapport between the parties, avoiding leading questioning, non-bias prompting, keeping to much the same sequence of questions, and then in the categorisation stage of analysis, sticking with consist coding of responses. Silverman (2005, p.230) also adds the following three reliability measures: Recording all face-to-face interviews, carefully transcribing these recordings according to the needs of reliable analysis, and presenting long extracts of data in the research report, including the questions that provoked the answer.

Method Validity (Credibility)

However, by itself reliability, though necessary, is an insufficient condition for validity (Leedy & Ormrod, 2005). The measuring of validity goes beyond consistency to ensuring acquiring of results that accurately reflect the concept being measured. It refers to the appropriateness, correctness, meaningfulness, and usefulness of the specific inferences and conclusions researchers make based on the data they collect (Cohen, et al., 2000; Fraenkel & Wallen, 2006). The relevance of the term 'validity' to qualitative designs is questioned by many with the suggestion that terms such as *credibility* and *transferability* are more appropriate (e.g. Cresswell, 1998; Leedy & Ormrod, 2005). A range of strategies are available in establishing such credibility and transferability.

Firstly, attempts will be made throughout the process to minimise the amount of bias on the part of the interviewer, interviewee, and question content. It is particularly important that interviewees do not conceive that the researcher holds any preconceived notions regarding the outcome of the study (Burns, 2000; Cohen, et al., 2000). Secondly, there will be extensive use of thick description, where the data is portrayed honestly in all its richness, authenticity and scope, allowing for readers to draw their own conclusions. Thirdly, feedback will be sought from the interviewees as well as other colleagues to determine whether the appropriate interpretations and conclusions drawn were valid.

E. RESEARCH DESIGN AND METHODS

Research Design

In considering a coherent research plan I am guided by the maxim, "Research design is governed by the notion of fitness for purpose" (Lewis-Beck, et al., 2004, p.677). Methodological pragmatism (Cohen, et al., 2000, p.112-113) gives priority to the, "...the overarching aim of the research, the specific analysis goal and its associated research question, the preferred paradigm, the degree of

desired research control, the level of investigator intervention, the available resources, the time frame, and aesthetics” (Crabtree & Miller, 1999, p.5).

Elements of Design

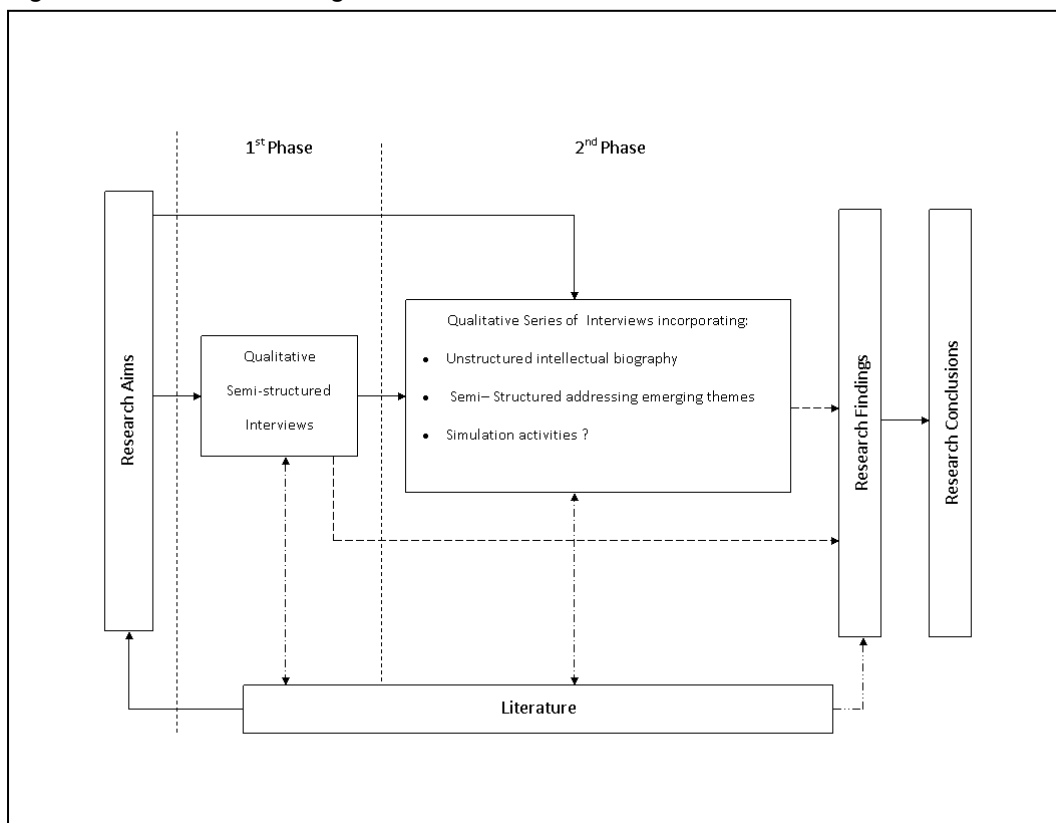
At this formative stage in the thesis process the following two phase design has been constructed (Figure 2, p.27).

The first phase will be undertaken with a medium-sized cohort of experienced principals numbering between 12 and 15. For a description of this cohort refer to the section on profiles of participants below (p.28). The method will take the form of semi-structured interviews, each anticipated to take 1 – 1 ½ hours, conducted over a 2 month period in mid 2011. It will have as its main purpose the exploring of themes and questions arising from both the subproblems and the review of literature.

The second phase will explore substantial themes that emerge from the first phase analysis with a small number (3 or 4) of principals. It is thought at this stage that these principals will be different individuals from those interviewed in phase one. A series of in-depth interviews will be undertaken that give emphasis to authentic narratives. It is anticipated that this would involve the researcher and participants in unstructured and semi-structured interview situations with the inclusion of discussions around prepared vignettes and some form of reflective tasks or journaling. This phase should take three to four months from later in 2011 through to early 2012. The timing has to be flexible in its timing as depth will take precedence over process.

The perceived advantages of this design are as follows: It allows for in-depth consideration of the key questions and themes that the study seeks to explore and answer, it gives respect to the interactive and narrative nature of the process, it enables emerging ideas to be further elaborated, and meets the practical considerations of finding and working with participants within a reasonable geographical area while I continue in fulltime employment.

Figure 2 - Research Design



Data Collection Strategies

Profile of Participants

Approach to Sample Choice

Crabtree and Miller recommend that for in-depth interviews “...respondents should be selected so as to maximise the richness of information obtained pertinent to the research question” (1999, p.96). For the first phase of research ‘maximum variation sampling’ (Patton, 1990) fits the intent of the design, as I am endeavouring to obtain the broadest range of information and perspectives while striving for depth of response. This type of sampling “documents unique or diverse variations that have emerged in adapting to different conditions” as well as identifying “important common patterns that cut across variations” (Wengraf, 2001, p.102). For the second phase ‘theoretical sampling’ (Patton, 1990) is most appropriate as I will be intent on building theoretically relevant constructs. Such sampling builds certain characteristics or criteria which help develop and test the evolving theory and explanation (Mason, 1996, pp.93-94).

Phase 1: Population Description

Number	Range of between 12 and 15
Gender / ethnicity	Best balance possible
Service	Experienced principals having served either: long-term in one school; or medium-term in two or more schools
School levels	Primary, Composite/Area, or Secondary
School type	State, State Integrated or Independent Co-educational, Single sex Socio-economic Decile range
Region	Canterbury Province, New Zealand

Phase 2: Population Description

Drawn another group from same region

Number	3 or 4
Gender / ethnicity/ Nature of service	Best balance possible
School level / type / decile	Best balance possible

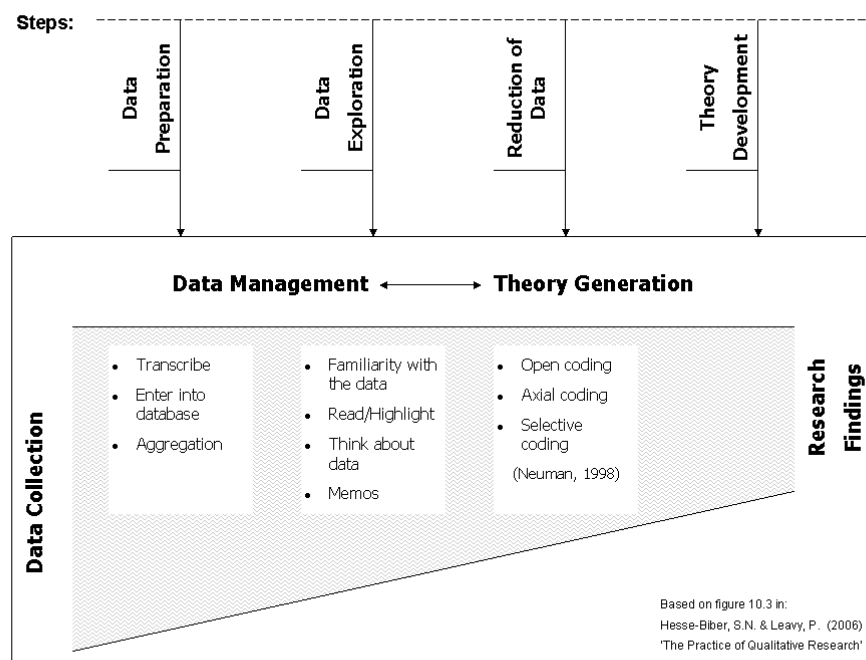
Data Management Strategies

Data Analysis Strategies

When analysing qualitative research information, textual analysis predominates (Morrison, 2002, p.21). It is important therefore that suitable modes of analysis are employed in order to draw out the “...salient themes, recurring ideas or language, and patterns of belief that link people and settings together” (Marshall & Rossman, 1999, p.154).

The analysis process will be keeping with the methodological approach outlined earlier referred to as Grounded theory. As shown in *Figure 3* the analysis will follow four steps: Data preparation, data exploration, the reduction of data, and theory development.

Figure 3: A Visual Model of Qualitative Data Analysis & Interpretation



Data Preparation

The first step in analysis is "tidying up" (Ro-magnano, 1991). This involves such tasks as making copies of all data, putting all field notes and interviews on file in order of their dates of creation, and reviewing the research questions and comparing them against the data collected to ensure coverage.

Data Exploration

Prior to analyzing each interview transcript, it will be read several times along with the accompanying field notes until there had a sense of the holistic sense of the interview. This will enable a visual display to be developed for each interview representing relationships and links between themes and their subsequent sub-themes. Further, critical terms, key events and salient themes will be looked for and then a grouping of these into concepts so that the initial codes can be developed.

Reduction of Data

Grounded theory, as previously discussed, is characterised by the researcher working back and forth between the collected data - the actual language of the respondents – and a process of coding in an inductive manner. In grounded theory, this coding process is normally done quite informally. Key points from the texts, be they words, phrases, metaphors, or salient narratives, are marked with a series of identifying anchors or *code*. These codes are then grouped into similar *concepts* in order to make them more workable. From these concepts, *categories* are formed, which are the basis for the creation of a *theory*, a collection of explanations that explain the subject of the research. Neuman (1998, p.422-424) identifies three parts to this coding process; open coding, axial coding and selective coding. These steps provide "...a structured and relatively systematic way of boiling down a huge body of data into a concise conceptual framework that describes and explains a particular phenomenon" (in Leedy & Ormrod, 2005, p.141).

Open Coding

Open coding is based on the concept of data being opened up as a means of reducing a large amount of field notes or transcripts to a small set of themes that appear to describe the phenomenon under investigation. The written data are divided into segments and then scrutinised for commonalities that reflect categories or themes. As more data is coded these initial categories are constantly compared and further examined for properties that characterize each category (Leedy & Ormrod, 2005, p.141). Such categories at this stage are at a low level of abstraction, coming from initial responses to questions and new thoughts stimulated by immersion in the data (Neuman, 1998; Schwandt, 2001). Accompanying the initial codes can be memos (code notes) that discuss the codes which are often useful as markers of the evolutionary process and helpful to refer back to at later stages.

Axial Coding

In this second layer of coding the focus gradually shifts from working between the data and initial codes to the condensing and making connections among categories and subcategories through a combination of inductive and deductive thinking. It is important to have fairly abstract categories in addition to very concrete ones, as the abstract ones will help in the final generation of theory. Rather than looking for any and all kind of connections, emphasis is given to framing relationships between the phenomenon and the causal conditions. In determining more about each category consideration is given to the conditions that give rise to it, the context in which it's embedded, the strategies that people use to manage it or carry it out, and the consequences of those strategies (Leedy & Ormrod, 2005, p.141). This is the heart of the analysis and interpretive phase (Crabtree & Miller, 1999, p.20).

Selective Coding

As categories become saturated by commonalities in the data the process becomes increasingly selective with the categories and their interrelationships combining to form a 'storyline' that describes 'what happens' in the phenomenon being studied (Leedy & Ormrod, 2005, p.141). That is, selective coding is about finding the driver that impels the story forward, a core category to which all other categories relate and that delimits the study as new data is sampled in a deductive manner, what is termed theoretical sampling. Explanations are formed; theory is built.

Theory Development

The final step in the process of analysis is the development of a theory offered as an explanation of the evolving nature of the phenomenon in question, based upon and emerging from the data. That is, a theoretical model is applied to the data. Such theorising takes the form of a verbal statement, visual model, a series of hypotheses, or a combination of these.

Appendix 5 sets out a preliminary list of sources that I am working through in terms of methodological and research design approach and strategies.

F. ETHICAL CONSIDERATIONS

Ethical issues can arise at any stage of a research project, from the nature of the project itself to the data collection methods employed through to what is done with the data collected. With this particular study the ethical issues primarily revolve around the treatment of the interview participants and their responses with the first principle centring on informed consent.

All participants in the study will be mature adults, who will participate voluntarily and give informed written consent to be involved. Such informed consent will respect each participant's right to freedom and self-determination and reflect personal competence in making of informed choices on the basis of being given full information in regards to the study's purpose and all its processes. (Gorard & Taylor, 2004, p.45).

Busher (2000, p.47) addresses an important issue that needs to be born in mind when working with people who are deeply immersed in their institutions, such as principals, namely, that membership of institutions often constrains the actions of individuals, distorting the views that they may feel allowed or able to give to those researching the processes of those institutions. Therefore at every point in the process it will be important to build a level of trust and receptivity that encouraged open and frank responses. Fundamental to that trust will be the principles of anonymity and confidentiality. All participants shall be guaranteed anonymity through processes such as the changing of names on transcriptions and withdrawal of material that might identify a particular individual or school. Privacy will be kept paramount with questions being confined to the scope of the research.

Since it is professional peers that are being interviewed it is likely some will be known to the researcher. This may produce more 'honest' answers as I have 'inside' status. However one perceived drawback is that interviewees may want to be seen as professionally adequate.

G. PRELIMINARY CHAPTER HEADINGS FOR THESIS

Fore Matters

CHAPTER 1: Introduction

- 1.1 The Context
- 1.2 The Problem
- 1.3 Delimitations
- 1.4 Definition of Terms
- 1.5 Outline of the Thesis

CHAPTER 2: Conceptual Framework

- 2.1 The Conceptual Approach
- 2.2 Grounded Theory Approach
- 2.3 Field and Role
- 2.4 Habitus and Identity
- 2.5 Zone of Negotiation

CHAPTER 3: Literature Review

- 3.1 Field and Role – *shaped in particular by:*
 - Policy environment
 - Educational leadership perspectives
- 3.2 Habitus and Identity – *shaped in particular by:*
 - Personal backgrounds
 - Career trajectories
 - Local context
- 3.3 Zone of Negotiation

CHAPTER 4: Methodology

- 4.1 Methodology

- 4.2 Research Method
- 4.3 Role of the Researcher
- 4.4 Research Design
- 4.5 Data Collection Strategies
 - Profile of Participants
 - Instrumentation Design
- 4.6 Data Management Strategies
- 4.7 Data Analysis Strategy
 - Data Preparation
 - Data exploration
 - Reduction of the Data
 - Theory Development
- 4.8 Ethics

CHAPTER 5: Findings and Analysis

CHAPTER 6: Discussion of Findings

FINAL CHAPTER: Conclusions and Recommendations

Appendices

References

H. APPENDICES

Appendix 1: Preliminary Theoretical Sources

Name	Year	Theorist	Concepts / Issues
Broader Sociological Perspectives			
Bottero	(2006)	Bourdieu	Relationships between the dispositional, reflexive and discursive aspects of identity
Bourdieu & Passeron	(1990)	Bourdieu	Social Theory - Reproduction
Bourdieu	(1990)	Bourdieu	Flexivity
Brubaker	(1993)	Bourdieu	Social Theory as Habitus
Gunter	(2002)	Bourdieu	Habitus and Field in educational leadership studies
Gunter	(2004)	Bourdieu	Habitus and field in educational leadership knowledge claims and field labels
Gunter	(2002)	Bourdieu	Social Theory - habitus, practice, field and social capital
Harker et al (NZ)	(1990)	Bourdieu	The relation of Bourdieu to education
Lingard & Christie	(2003)	Bourdieu	Social Theory - habitus, practice, field and social capital
Lingard et al	(2003)	Various Bourdieu	Various concepts of Bourdieu
Thomson	(2003)	Bourdieu	practice, habitus, field, misrecognition, symbolic violence
Fitz	(1999)	Bernstein Bourdieu	theorization of fields and discourse
Bernstein	(2000)	Bernstein	Pedagogy (horizontal and vertical), repertoire and reservoir, pedagogy, symbolic control, Identity
Atkinson	(1985)	Bernstein	Language, structure and reproduction
Singh	(2002)	Bernstein	Pedagogic Device
Beck	(2002)	Bernstein Durkheim	Sacred and Profane in relation to official pedagogic Identities in education (esp. Tertiary)
Ball	(1990)	Foucault	Education: disciplines and knowledge
Ball	(2004)	Foucault	Broad sociological perspectives
Giddens	(1991)	Giddens	Social Theory - identity construction / structuration
Knowledge Field Perspectives / Approaches			
Gunter & Ribbins	(2002)		Mapping the knowledge field of educational leadership
Ribbins & Gunter	(2002)		
Watson	(2004)		Relates to the mapping of knowledge by Gunter & Ribbins
Sen	(1999)	Sen	Capability theory
Walker & Unterhalter	(2007)	Sen	Capability theory / social justice BATES – Theory in terms of educational leadership
Samier & Bates	(2006)		<i>Aesthetic</i> perspectives on educational leadership
Hodgkinson	(1991)		Educational leadership as a moral undertaking
Gunter	(2000)		<i>Critical</i> approaches to leadership in education
Ogbor	(2001)		<i>Critical</i> theory - Hegemony of corporate culture
Bush	(2003)	Various	Perspectives over history of educational leadership studies
Identity Theory / Perspectives (sociological, psychological, organizational)			
Archer	(2003)		'Internal conversation' as a process for negotiating agency and structure
Grint	(2003)		Identity
Polkinghorne	(1996)		Narrative identity
Jenkins	(1996)	Various	Social identity
Elliott	(2008)	Various	Concepts of the self
Blake & Johnson	(2001)		Social Identity - Saliency of organizational identities
Palmer	(1998)		Teaching (Leading) from the Self
Calhoun	(1994)		Social theory and the politics of identity
Hogg & Terry	(2001)		Social identity processes in organisational contexts
Emirbayer & Mische	(1998)		Ideas around agency
Collinson	(2006)	Various	Useful section - theorists of identity & organizations
Simpson & Carroll	(2008)		Role theory and identity construction
Meltzer	(1997)	Bakhtin	Intertextuality
Brown	(2000)		Group processes and Social identity
Hellriegel & Slocum	(2007)		Organizational behaviour
Schaefer	(2005)		Sociology text

Appendix 2: Preliminary Contextual Sources

Name	Year	Nat	Issues and Concepts
Also refer to Appendix 3: Research sources – Nearly all studies provide commentary on educational milieu and dominant discourses in the field			
Alison	(2004)	NZ	Political ideologies and discourses in New Zealand education
Cammock	(2003)	NZ	Call for soul in 21 st Century educational leadership
Fitzgerald	(2009)	NZ	Public management reform & school organization
Greer	(2007)	NZ	Expectations on principals in New Zealand
Hodgen & Wylie	(2005)	NZ	Stress and wellbeing among New Zealand principals
Jones	(2007)	NZ	The changing role of principalship in New Zealand
Ministry of Education	(2009)	NZ	M.O.E Statement of intent 2007 – 2012
Ministry of Education	(2008)	NZ	Ka hikitia - managing for success: the Maori education strategy 2008 - 2012
OECD	(2008?)	NZ	Improving school leadership: country background report for New Zealand
Stewart	(2000)	NZ	Tomorrow's principals today
Thrupp	(2005)	NZ	“Official school improvement” in England and New Zealand
Fitzgerald & Gunter	(2008)	INT	The state of the field of educational administration
Hargreaves	(2009a, 2009b)	INT	The fourth way of leadership and change: Tracing major educational era's since 1950's in anglo-american systems
Blackmore	(2004)	AU	Counterintuitive impulses of performativity and passion
Blackmore	(2004)	AU	Leaders in a public education Australia mediate reform discourses
Caldwell & Spinks	(1992)	AU	Self-managing school environments
Caldwell	(1998) (2006) (2008)		
Christie	(2002)	AU	Gronn's ideas around four stage principal <i>career trajectory</i>
Gronn	(2003) (1999)	AU	Changing leadership practice in an era of school reform
Mulford	(2003)	AU	School leaders: changing roles and impact
Thomson	(2004)	AU	Principal identity
Caldwell	(2003)	AU	
Duignan & Collins	(2003)	AU	
Lingard et al	(2003)	AU	
Ball	(1994)	UK	Education reform: A critical and post-structural approach
Barnett	(?) 03?	UK	Changing external policy context / role of school principal
Bottery	(1992) (2004) (2008)	UK	The <i>ethics</i> of educational management Perspectives on <i>school organization</i> Contexts, challenges, purposes, qualities of leadership
Busher	(2008)	UK	Complexities of secondary schools as organisations
English	(2008)	UK	Educational leadership - <i>performance and accountability</i>
Fidler & Alton	(2004)	UK	Challenges of contemporary school leadership
Gunter	(2008)	UK	Modernisation and the field of educational administration
Stevenson	(2006)	UK	New principals in diverse cultural contexts + socialisation
Strain	(2006)	UK	Performance and performativity in principalship
Woods & Jeffrey	(2002)	UK	Reconstruction of primary teachers' identities in facing powerful discourses and change in professionalism
Bolman & Deal	(1997)	US A	Reframing organizations
Blake & Johnson	(2001)	US A	The relative <i>salience</i> of <i>multiple identities</i> in organizations
Goldring & Greenfield	(2002)	US A	Leadership in education: <i>roles, expectations, and dilemmas</i>
Greenfield	(1995)	US A	Negotiating complex interplay of school administration
Handel	(2003)	US A	The sociology of organizations
Kochan & Reed	(2005)	US A	The changing face of Principalship
Yukl	(2005)		
Brown	(2000)		
Lugg	(2002)		
Ball	(2004)		
Greer	(2007)		
Young	(2004)		
Gronn & Ribbins	(1996)		
Hargreaves	(2005)		

Duignan & McPherson	(1992)		
Ogawa	(2005)		
Bennett et al	(2003)		
Di Paola	(2003)		
Riley & Macbeth	(2003)		
Weber & Mitchell	(1996)		
Wenger	(1998)		
Leithwood & Prestine	(2002)		
Crow et al	(2002)		
Briggs & Coleman	(2007)		
Connelly & Clandinin	(1999)		
Gunter	(2003a, 2005)		
Restine	(1997)	US A	Pre-service experiences and the shaping of practice
Sergiovan ni	(2000) (2003) (2005) (2006)	US A	<i>Lifeworld of principals</i>

Appendix 3: Preliminary Research Sources

Name	Year	Nat	Sector	Population	Method	Focus
Most Relevant to Topic						
Cavallaro Johnson	(2009)	AU	Secondary Urban	1 x Principal	Narrative Interview	Complexities of principal practices production of the principal's narrative identity formation
Hammersley -Fletcher	(2007) (2008)	UK	Cross sector	Principals Teachers	Mainly semi-structured interview	Power, position, changing educational environment
Jetter	(2010)	US A		22 Principals		Identity ...
Jones	(2007)	UK	Primary	10 x Principals	Semi-structured interviews	Constructing identities: perceptions and experiences of male primary headteachers
Loder & Spillane	(2005)	US A	Un-specified	Women Principals in first 5 years	Semi-structured interviews	Transition and identity role conflict and role discontinuity
McGough	(2003)	US A		23 Experienced Principals	In-depth interviews Comparative case study	Identity Formation Career trajectory
Meltzer	(1997)	US A		83 Principals	Discourse analysis Of oral histories (1920-1990)	how socio-cultural and contextual factors influence construction of identity of self-as-principal
Notman & Henry	(2009)	NZ	Prim / Sec	6 x Principals	Interview?	Successful principal practice
Sugrue	(2002)	IRE	Primary	Principals		Identity
Thew	(2002)	NZ	Primary	3 x Principals Larger cohort	Ethnographic In-depth interviews Questionnaire	influence and interplay of context and personal biography
Some Relevancy in terms of Cohorts, Context, and Theme						
Court	(2004)	NZ	Primary	6 x co-princs	Narrative Interview	Co-principalship Identity
Blackmore	(2004)	AU	Prim / Sec			Professional change in times of Marketisation
Thomson & Blackmore	(2006)	AU	Various	Principals	Case studies Biography	Redesigning principal's roles - five pathways
Connelly & Clandinin	(1999)	CA-US A	Prim / Sec	Teachers Adminstrators	Narrative Interview	Identity formation
Branson	(2007)	AU	Primary	7 x Principals	Interview	Authentic leadership and values
Gunter	(2004) (2006)	UK	Tertiary	Heads of Institutions	In-depth interview	Identity formation Career trajectory
Hall & Southworth	(1997)	UK		Principal	Ethnography	Identity formation Career trajectory
Wylie	(1997)	NZ	Primary Education	Principals	Interview Documents Questionnaire	Role and challenges
Youngs	(2004)	NZ	Tertiary	Leaders Teachers Students	Mixed Questionnaire 2 Interviews Focus Group	Servant Leadership incl - self care
Gaziel	(2003)	ISR	Primary	20 Principals	Interview	Principal effectiveness
Gold	(2003)	UK	Prim / Sec	10 schools	Case Study	Principal effectiveness

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Gurr & Drysdale	(2008)	AU	Cross sector	Various	Multi method	Leadership models
Restine	(1997)	US A		Principals		Pre-service experiences and the shaping of practice
Stevenson	(2006)	UK		Beg Principals		Pressures and tensions
Hargreaves	(2005)	US A	Cross sector	50 Teachers		emotional responses to educational change @ different ages / stages
Janson	(2008)	NZ	NZ Ldrshp Institute	Leaders from various sectors	Interview Quant survey	Leadership formative experiences
Lyons (PhD)	(2005)	AU	Yet to access full study			Interplay between principal's meaning system and school self-renewing processes
Sugrue	(2005)		Yet to obtain book			learning from the life histories of principals
Strachan	(1997)	NZ	Yet to access full study			Practising Feminist Educational Leadership in a 'New Right' Context
Alsup & Mahwah	(2006)		Yet to access full study			Teacher identity discourses: negotiating personal and professional spaces

Appendix 4: Sample of Initial Writing around Elements of Subproblem 1

To understand the dynamics of educational leadership in the New Zealand context, and the shifting role of principalship within it, it is imperative that there be a critical appreciation of the nature and impact of the dominant discourses that have of recent times shaped and directed the field of education. What follows is an examination of two key streams of influence: policy environments and perspectives on administration and leadership.

Policy Environments

Over the last quarter century New Zealand, as with most comparable nation states of the Western world, has lived in a period characterised by a consortium of globalized political ideologies broadly grouped as neo-liberal, social democratic, and neo-conservative (Alison, 2004; Leithwood & Day, 2007, p.1). The discourses associated with these ideologies, those combined patterns of language and social practices, have interacted in ways that have ensured constant flux in terms of social structures and polity. The field of education has been a particular focus of these culture wars resulting in shifting alliances of often incongruent ideas and practices. This state of affairs is of course not surprising, for as Bates (1994) points out,

“[E]ducation is fundamentally concerned with the construction of meaning and identity - that is with psychological and cultural processes. At the same time, education systems are major 'steering mechanisms' through which the structures of economic and political organisation are managed - that is, they are heavily subject to processes of rationalisation taking place in the economic and political spheres” (p. 51).

As with other sectors within the education system of New Zealand and comparable countries, the compulsory schooling sector has been subjected to sustained, deep-seated restructuring (Blackmore, 2004, p.439; Stromquist & Monkman, 2000). Nested as they are within larger social, cultural, economic, and political environments (E. Goldring & W. D. Greenfield, 2002, p.2), schools, and those that administrate and lead them, have had to negotiate their way through reforms that have reshaped every aspect of educational policy and delivery including curriculum, pedagogy, examinations and assessment, school organisation, teacher education, and educational leadership. At any one time they have encountered the incongruous discourse mix alluded to earlier where for instance the tenets of competition and choice consistent with neo-liberal discourses sit uncomfortably alongside creeds of social equity promoted by social democratic discourses.

Hargreaves (2009a), in his insightful consideration of the global shifts in schooling practice over the last half century, provides us with a helpful topography of this meeting and mingling of discourses. The first ‘way’, which prevailed from the 1960’s through most of the following two decades, was characterised by ‘innovation without cohesion’ (Hargreaves, 2009b); a mix of state support and professional freedom, of uneven school performance and idiosyncratic leadership, of educational improvements informed by intuition and ideology rather than evidence, and of relative detachment from the parental community. With relative freedom came challenges with variability of educational delivery, a state that was seen to need remedial action as the fields of politics and economics took precedence.

Enter the second way, one that gained rapid momentum in New Zealand during the mid to late 1980’s and became embedded during the 1990’s, which was guided by strongly neo-liberal and neo-conservative discourses (Blackmore, 2004, p.439; Bottery, 2008, p.15). The resultant policy frameworks, organisational theories and technologies adopted came to be labelled “New Public Management” (Gronn, 2003, p.7; Hood, 1995; Thomson, 2004, p.48). The discourses of power associated with this managerialism, marked by maxims of choice and competition (Ball, 2004,

p.143; Blackmore, 2004, p.439), with an accent on accountability and auditing mechanisms (Thomson, 1998), amongst other things, energised the push for efficiency gains across public service sectors with the aim of economic advantage and advancement (S. Taylor, Henry, Lingard, & Rizvi, 1997). The new drivers of education were markets and standards with an accompanying loss of professional autonomy and innovation often coming at great cost to teacher motivation, leadership capacity, and student learning (Hargreaves, 2009a, pp.17-20).

The third way, which has been influenced by more social democratic aims and permeating New Zealand schooling over the last few years, is in essence a revamped version of the large-scale reforms of the previous decade (Hargreaves, 2009a, p.21) Best encapsulated as 'outcomes-based education' (Alison, 2004), this discourse shift has sought to promote social cohesion while retaining economic dynamism, providing greater autonomy linked with increased accountability. In a sense it is a paradoxical fusion of the 'culture of production' (Bates, 1994, p. 51) combined with a distinctively 'Kiwi' ethos mix of pragmatism, conservatism, and egalitarian aspirations. An example lies with the place given to performance data. As well as being an evidence source to inform better teaching and learning, it has been used to position schools in the market of parental choice, and employed as a handy political device for further reforms such as the current implementation of national standards at primary. As a last part the topographical survey Hargreaves and associates offer a vision of what is deemed a more sustainable way (Giles & Hargreaves, 2006; Hargreaves & Fink, 2006), one which integrates government policy, professional involvement, and community engagement to help transform teaching and learning in schools (Hargreaves, 2009b).

A survey of the literature highlights a number of aspects associated with this highly contested educational field described briefly above and the shifting role of principalship within it. Those of particular significance all reveal a paradoxical tenor; the incongruous marriage of decentralised structures to escalating centralised control, a dichotomy of autonomy and accountability, the encroachment of performativity and job intensification alongside a push for authenticity and community partnership, and the notion of 'designer leadership' (Gronn, 2003) through increasingly distributive constructs.

Centralisation and Decentralisation

The first significant feature associated with the reforms born of the new managerialism is the paradoxical combination of centralisation and decentralisation (Barnett, 2002, p.2; Bates, 1994, p.52; Bottery, 2004, p.86; Caldwell & Spinks, 1998, pp.10-11; Thomson, 2004, p.49) that plays out in a 'tight, loose, tight' systems-level approach (Alison, 2004). The first 'tight' encapsulates the outcome expectations set by central government agencies; the 'loose' refers to the devolving of authority and responsibility to self-managing, site-based management for the realization of those outcomes (Caldwell, Calnin, & Cahill, 2003, p.91; R. T. Ogawa, 2005); and the second 'tight' is the accountability and compliance demands from the centre in regards to the results produced. There is in effect a splitting of "...decision making, executive management and daily management and delivery", where schools are "...required to meet quantifiable outcomes defined, monitored and evaluated elsewhere" (Thomson, 2004, p.49).

There is a constant interplay between what is centralised and what is devolved. Take for instance the development and rollout of the nationally mandated curriculum over the decade of the 1990's that coincided with the establishment of the decentralised school management regime of 'Tomorrow's Schools'. Characterised by tightly prescribed sets of learning objectives and equally tightly controlled forms of reporting on the one hand, this curriculum was implemented within schools by community elected Boards of Trustees and management who made decisions around staffing, budgets, physical plant and how learning programmes would be shaped to deliver the curriculum (Leithwood & Prestine, 2002, p.45). This issue of "...the linkage between these

frameworks and capacities at school level that come with self-management on the one hand, and learning outcomes for students on the other” (Caldwell & Spinks, 1998, pp.10-11) epitomise the paradoxical interplay of simultaneous centralisation and decentralisation.

At its best this two tiered interdependent governance model has enabled schools to become more community conscious and connected, responsive to the needs of the young lives in their care and innovative in both designing learning programmes and adopting creative pedagogical to meet those needs. At worst what has occurred is, “the bureaucratisation of professional practice (and everyday life) to ensure that schools, teachers, pupils and educational leaders conform to an agenda that is shaped around the public interest” (Gunter & Fitzgerald, 2008, p.265).

Performativity and Authenticity

A second corollary of the new managerialism and arguably more moderate way of outcomes education has been the increased ‘culture of performativity’ (Gronn, 2003, p.8). According to Ball (2004), “performativity is a technology, a culture and a mode of regulation ...that employs judgements, comparisons, and displays as a means of control, attrition and change” (p.143). Schools as organizations, and the individuals they comprise of, are subject to measures that serve to inspect and/or promote their productivity and hence their worth. Consequently schools now follow familiar management practices such as strategic planning, performance management systems, and annual reporting including variance reports in terms of learning achievement targets (Thomson, 2004, p.49). Performance indicators are built into nearly every aspect of institutional practice, from student achievement to fiscal and asset stewardship, from attestation of teachers against professional standards to sometimes elaborate health and safety protocols; all allowing for charting, comparison and competition. The resulting collections of aggregated data are reported on through and to central agencies by way of audits, evaluations, external reviews, national norm referenced achievement regimes and the like. Not only are these then used ostensibly to inform public policy but they are then opened to public scrutiny in the belief that they will promote transparency, inform choice, and show ‘value for money’ – outputs justifying inputs. As Mulford so perceptively expresses it:

All these rules and regulations, competency lists, strategic plans, examinations and so on give confidence to the outside (and to many of those inside) that the educational system and its schools know what they are doing. The structure of the system or school is the functioning myth of the organisation that operates not necessarily to regulate intra-organisational activity, but to explain it, account for it and to legitimate it to the members outside the organisation and to the wider society. (2003, p.4).

Such emphasis on performativity and positioning within the new educational marketplace has in effect “...repositioned parents as clients, teachers as providers and students as consumers” (Blackmore, 2004, p.443). And, I would add, ‘centralised agencies as both arbitrators and advertisers’. According to Thomson, it is about “...the production of an architecture of artefacts [that] re-present organisations in the best possible light, to prove beyond doubt their efficiency and effectiveness” (Thomson, 2004, p.49). Performativity if left unchecked and unquestioned results in administrative practice being driven by non-educational criteria (Duignan & Macpherson, 1992, p.3) and another bar being added to the Weberian ‘iron cage’ (Bates, 1994, p.50).

Appendix 5: Preliminary Methodological Sources

Name	Year	Nat	Focus of Text / Article
Also refer to Table 3: Research sources – ‘Method’ Column			
Methodology/Methods most relevant to proposed research design			
Bishop	(1997)	NZ	Narrative inquiry / Semi-structured interview
Clandinin & Connelly	(2000)		Narrative inquiry
Court	(2004)	NZ	Narrative and discourse analysis
Day	(2005)	UK	Narrative interview: Bramburg’s concept <i>positioning analysis</i>
Denzin	(1989)		Interpretive biography
Dilley	(2000)		Conducting successful interviews
Gronn	(2007)	AU	In-depth interviewing
Gronn & Ribbins	(1996)		Postpositivist approaches: ethnography and biography
Gumbrium & Holstein	(1997 , 2002)		Active interviewing
Gunter	(2006)	UK	Intellectual histories
Gunter	(2003 a)	UK	Intellectual histories
Gunter	(1999)	UK	Intellectual histories
Huber	(2000)	US A?	Narrative inquiry
Kvale	(1996)		Qualitative research interviewing
Ribbins	(2007)		Interviews in educational research:
Rubin & Rubin	(1995)		Qualitative interviewing
Broader coverage of research methodology and research design			
Lieblich et al	(1998)		Narrative research
Briggs & Coleman	(2007)		Educational Leadership and Management research
Anderson	(1998)		Educational research
Best & Kahn	(1998)		Educational research
Cohen et al	(2000)		Educational research
Johnson & Christensen	(2004)		Educational research
Keeves	(1997)		Educational research
Fraenkel & Wallen	(2009)		Educational research design
Creswell	(1994) (1998) (2008)		Research design Qualitative research design Educational research
Bogdan & Biklen	(2007)		Qualitative research for education
Husen	(1997)		Educational research - paradigms
Bouma	(1996)		Research design & methods

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Burns	(2000)		Research design & methods
Klenke	(2008)		Qualitative research in leadership
Crabtree & Miller	(1999)		Qualitative research
Denzin & Lincoln	(1994)		Qualitative research
Patton	(1990)		Qualitative research
Baker	(1988)		Social science research
Lewis-Beck et al	(2004)		Social science research
Neuman	(1998)		Social science research
Leedy & Ormond	(2005)		Practical research
LeCompte	(2000)		Analyzing qualitative data
Miles & Huberman	(1994)		Qualitative data analysis
Silverman	(2005)		Interpreting qualitative data
Pidgeon & Henwood	(2004)		
Mason	(2002)		
Wengraf	(2001)		
Creswell & Miller	(2000)		
Ritchie & Lewis	(2003)		
Morrison	(2007)		

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