

Pathways to the school principalship: An international scoping review

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Abstract

This scoping review of the international literature published over the last 50 years in educational leadership and management journals provides a thematic exploration of factors influencing pathways at the pre-entry stage of a principal's career. Findings from a thematic analysis of 68 publications show that attention to prospective principals increased after the year 2000 and this was driven by four main concerns: underrepresentation of women and ethnic minorities, principal supply and demand, the principalship as a school improvement lever, and the expansion of leadership posts in schools. Selected articles addressed three dimensions of the pathways before a person is first appointed to this post: (a) micro (individual's agency), (b) meso (preparation of prospective principals), and (c) macro (policies shaping access to the post). Across time and countries, pathways to the principalship are resourced by individuals' professional orientations and by contextual factors, formal pre-service preparation may be desirable but not always available or required, and policies frame a conceptualisation of the principalship that shapes the two previous dimensions. The internationalization of research on pathways to the principalship has brought to the forefront normative assumptions that should be critically challenged when considering how to recruit, develop, and support prospective school principals.

Keywords

Principal preparation, school leadership policy infrastructure, school principal, headteachers, aspiring principals

Introduction

The first issue of the 'Educational Administration Bulletin', predecessor of EMAL, was published June 1, 1972 and includes a one-page document called 'Aims' for the newly established British Educational Administration Society. Second on the list is an explicit connexion to the topic of this paper: 'To provide a forum for the discussion of new approaches to the preparation and

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development of administrators and new developments in research among all those actively interested'. (pp. x-x) Since then, waves of educational reforms have added a range of new responsibilities for school principals and increased expectations and scrutiny of their work, with the prevailing image of the school principal changing over time from school administrator to school manager to school leader (Connolly et al., 2019; Evetts, 1994; Gunter, 2004). On whose shoulders have educational systems placed these growing school-level leadership expectations?

The invitation to contribute to the 50th anniversary of *Educational Management Administration & Leadership (EMAL)* offers an opportunity to scope the literature on the pathways to the principalship from an international perspective. A scoping review provides a snapshot overview of the empirical work to establish 'the extent, nature, and range of research activity on a particular topic or question; summarise and disseminate research findings; and, identify gaps in the existing research' (Fray and Gore, 2018: 154). For this review, we selected 68 publications published over the last 50 years that are representative of two trends: the drivers for research on pathways to the principal post, and the dimensions through which these pathways have been examined in the Global North and Global South. Reviewing this body of work provides insights into changes, continuities, and directions for further research concerning four pathway-relevant themes in the educational leadership field: understanding why people seek a principal post, what kinds of pre-service preparation are effective, how policies define the principalship, and what opportunities and constraints are created for a diverse pool of prospective principal's agentic actions when seeking this position.

Generally, interest in the principalship is premised on the multiplier effect of effective principals who could potentially influence the quality of teaching and the learning opportunities of students (Davis and Darling-Hammond, 2012; Turnbull et al., 2013). Effectiveness, however, represents a highly contested set of purposes, activities, social relationships, and values shaping professional identities (Begley, 2008; Gunter, 2004; Murphy, 2020; Stevenson, 2006). Notwithstanding disagreements on what the principalship entails, because school principals matter for schools' processes and outcomes, understanding the push and pull factors for entry and professional socialisation practices become relevant research issues to inform policy, recruitment, preparation, and supports for practice (Crow, 1992; Stevenson, 2006). The current review updates and extends previous studies that have examined pathways concerning personal characteristics, pre-service preparation, and policy infrastructure in specific countries (DeAngelis and O'Connor, 2012; Lee and Mao, 2020; Martínez et al., 2021; Murphy, 2020) as well as earlier studies in international contexts (Huber and Hiltmann, 2010; Lumby et al., 2008; Oplatka, 2004; Pont et al., 2008).

From a developmental perspective, pathways can be represented as career stages, that is, how prospective principals 'progress through a series of distinct occupational stages during their careers, with each stage being characterized by differences in work attitudes and behaviours, types of relationships, employees' needs and aspects of work valued by the employee' (Oplatka, 2004, 2012: 130). Whereas some authors situate a principal's career starting once the person is in the post (i.e. Oplatka, 2004), other authors define a pre-entry stage. Based on a longitudinal study of secondary headteachers in England and Wales, Earley and Weindling (2007) proposed a seven-stage model: preparation before headship, entry, and encounter, taking hold, reshaping, refinement, consolidation, and plateau. The current review is limited to the stage before the first-time appointment as a principal which is when a person explicitly aspires to attain the position and actively seeks to develop the intellectual and social professional capital (Hargreaves and Fullan, 2012) to enhance their chances of success (Moorosi, 2010).

The pathway literature addresses questions such as: Why and how do individuals enter the post? For whom is the principalship an appealing and sustainable career? What motivates teachers to move along the school leadership continuum (Davis et al., 2017; Gates et al., 2004; Ribbins, 2008; Stevenson, 2006)? How are individuals formally and informally prepared to gain access to this position? What do pathways to the principalship communicate about a system's expectations of and priorities for principals and their preparation? Examining pathways, therefore, is one way to reveal education systems' priorities, either explicit or implicit, for how schools should operate, the type of leadership promoted, and for what purposes (Gunter, 2004). These priorities act to incentivize individuals with some backgrounds, skills, and orientations to the job while shutting others out.

Before moving forward, we distinguish pathways to the principalship from principal pipelines; this latter is understood as a systematic approach taken by a district or government to recruit, develop, hire, evaluate, and support effective principals (Turnbull et al., 2013). The pipeline metaphor suggests that individuals do not influence how the system 'transports' them along the leadership continuum, limiting themselves to making choices to accept or reject the rules defined by others rather than changing what acts to exclude them or being co-participants in the development of the system (Tajmel, 2019). The pathways metaphor, as explained by Tajmel, involves individuals making their way through terrains as they move from one place to another. Movement on a pathway to the principalship involves human agency to gain access to desired professional opportunities. Individuals' agentic actions are understood as 'self-initiated and goal-directed behaviours that aim to take control over the work environment' (Goller and Harteis, 2017: 88), shape professional pathways as individuals interpret and respond to the socio-cultural conditions of the workplace, identifying resources, opportunities, and constraints to orient them in the attainment of a principal post (Crow, 1992; Edwards, 2015).

In what follows, we first provide a conceptual framework to examine the career pathways to the principalship. Next, the methodology followed to identify and select the studies used to scope research on this topic is described. Findings are presented in three sections: (a) descriptive overview of the articles selected, (b) drivers for research interest on pathways to the principalship, and (c) themes in three interrelated dimensions to examine pathways: micro or subjective; meso or pre-service preparation; and macro examining policies that shape alternative pathways (Cubillos and Brown, 2003).

Conceptualising career pathways

Adapting from Adkison (1981), a career pathway entails a sequence of positions ordered so that each provides experiences considered necessary to perform in subsequent positions. Other authors have framed this sequence as a division of labour, comprising both a horizontal (tasks distribution) and a vertical dimension (power distribution) (Hirsh and Bergmo-Prvulovic, 2019). The current review shows that in some countries the pathway to the principalship has been represented as a well-established leadership continuum, beginning as a teacher, moving to teacher leader, then moving into the assistant principalship, and onward to the principalship (Goldring et al., 2021). In other countries, such a sequence of stepping-stones along the way to the principalship is non-existent, it is ambiguous or defined in ways that create structural and cultural barriers for equal access to the principalship by women and ethnic minorities (Coleman, 2012; Goldring et al., 2021; Grissom et al., 2021).

Cubillo and Brown (2003) proposed a model distinguishing three dimensions influencing career paths: (a) a 'macro' socio-political level representing traditions, culture, religion, and policy; (b) 'meso' organisational level, such as preparation requirements and the infrastructure to meet them; and (c) 'micro' level which addresses an individual's motivations and how these are shaped by the previous two levels. Understanding pathways to the principalship from these three dimensions highlights push and pull factors for entering, remaining, and exiting the post as well as how the principalship is steered by policymakers and professional associations through practices for preparation, recruitment, and selection requirements (Crow, 1992; Milton et al., 2020; Ribbins, 2008; Stevenson, 2006).

Search and review methods

This review followed the principles of scoping reviews, aiming 'to map rapidly the key concepts underpinning a research area and the main sources and types of evidence available' (Mays et al., 2001, cited in Arksey and O' Malley, 2005: 21). In contrast to a systematic review, scoping reviews do not make judgments about the quality of the studies but seek to efficiently illustrate characteristics of the contributions in a field (Arksey and O'Malley, 2005). Adopting this method, we first categorized studies as exemplars of the micro, meso, and macro dimensions influencing career paths. Within each dimension, a thematic analysis was conducted to provide a descriptive overview of the literature in this area of study, to identify changes and continuities over time as well as high-light under-researched topics (Fereday and Muir-Cochrane, 2006).

Building on the work of Hallinger (2013), we initially drew publications from this collection of English language journals: *Educational Administration Quarterly*, *Journal of Educational Administration*, *Educational Management Administration and Leadership*, *International Journal of Leadership in Education*, *Leadership and Policy in Schools*, *School Leadership and Management*, *School Effectiveness and School Improvement*, *International Journal of Educational Management* and *Review of Educational Research*. Our analysis of articles from this collection of journals led us to other 'sibling studies' published in other English and Spanish language peer-reviewed journals and book chapters, and, occasionally, influential 'grey literature' indicative of how research is taken up by multilateral and non-profit organisations in the education sector.

We started with Boolean keyword search: ('school leader*' OR 'school principal' OR 'headteacher' OR 'aspiring principal') AND ('pathway' OR 'career') AND (professional aspirations OR recruitment OR selection OR preparation). Keywords were added based on the keywords used in the articles we identified. The results were restricted based on time of publication (1970 to the present), publication type (journal articles, book chapters, and books), country, and language of the text (English and Spanish), covering empirical, conceptual, and secondary analysis. This process led to an initial list of over 200 publications. After screening by relevance, that is directly addressing a topic at the pre-entry stage, and duplication, papers by the same author drawing from the same data set, 68 documents were selected for further thematic analysis (identified with an * in the reference list).

Findings

Consistent with the purposes of scoping reviews, we first provide a descriptive analysis of the 68 studies, highlighting developments over the last 50 years across different geographical regions.

Second, we address four major concerns that drive research and policy on pathways: underrepresentation of women and ethnic minorities, principal shortage and turnover, the significant role of the principal in school improvement, and the expansion of middle leader roles with the adoption of distributed leadership. In the third section, key issues pertaining to each of the three dimensions of the pathway literature reviewed are discussed: micro (subjective/individual), meso (pre-service preparation), and macro (policy).

Descriptive overview

Figure 1 shows the number of documents analysed, organised by year and dimensions. Although it was possible to identify contributions since 1974, the bulk of publications appeared after the turn of the century, consolidating as an area of research interest over the last decade. The attention to individuals' agentic actions to enter (or not) this job has dominated across the years covered, particularly in the last decade.

Although smaller in volume, the preparation dimension has followed a similar trend, having a spike of interest in the early 2000s. Whereas in an article mapping topics addressed by EMAL in its first 40 years, Bush and Crawford (2012: 538) observed a 'modest increase' in attention to the policy dimension from 2000–2010, in the current review we observe a steep increase between 2010–2020 across the EDLM journals scoped. The relatively stable low number of policy contributions in the first three decades needs to be interpreted cautiously as studies on the individual and preparation dimensions often point to policy implications such as the role of principals in school improvement. The adoption of new public management ideology in the education sector has served as the background for understanding principal supply and demand concerns (De Andrade et al., 2018; DeAngelis and O'Connor, 2012). This indirect presence of the policy

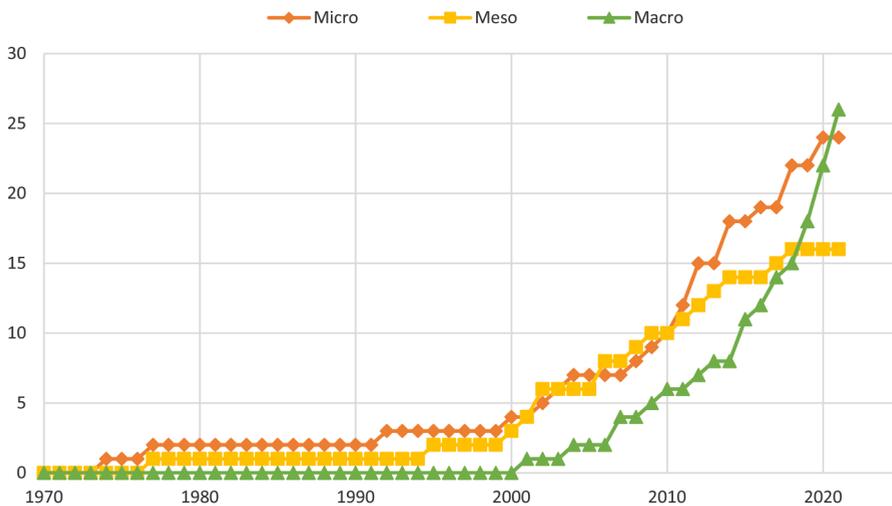


Figure 1. Distribution of publications analysed by dimensions of the pathways. Source: Developed by authors.

dimension exemplifies Crow's assertion (1992: 80): 'Career considerations also provide a way to understand the control systems used in educational organisations and occupations.'

Figure 2 illustrates how academic interest in this topic has evolved across regions over the last five decades. From the 68 documents analysed, only seven covered more than one region and in these cases the affiliation of the respective first author was used to allocate the study to a region. In agreement with what was previously reported by Hallinger and Kovačević (2019), during the first decades analysed, contributions were concentrated in Europe and North America, predominantly from the United States. Since early 2000 a broader participation, particularly from Africa and the Middle East region, can be observed.

Following Hallinger and Chen (2015: 11), studies were assigned to one of four research methods categories: quantitative, qualitative, mixed methods, and non-empirical, the latter defined as 'a combination of theoretical treatises and commentaries on policy issues'. Qualitative studies, most often drawing data from interviews with a small sample, and non-empirical work comprise close to three out of four studies reviewed. As Figure 3 shows, this distribution is highly moderated by region.

Why study pathways to the principalship?

Our analysis revealed four recurring concerns that are pathways-relevant. A first concern is the underrepresentation of women and of ethnic minorities in the principal's office. These studies started appearing in the 1970s in North America and England and over the last 20 years, the topic has been increasingly addressed in a wide range of countries. Pathways shed insights into women's interest in, and understandings of, the post as well as the institutional, organisational, and cultural barriers that constrain their access (Adkison, 1981; Chan et al., 2016; Coleman, 2012; Cubillo and Brown, 2003; Davis et al., 2017; DeAngelis and O'Connor, 2012;

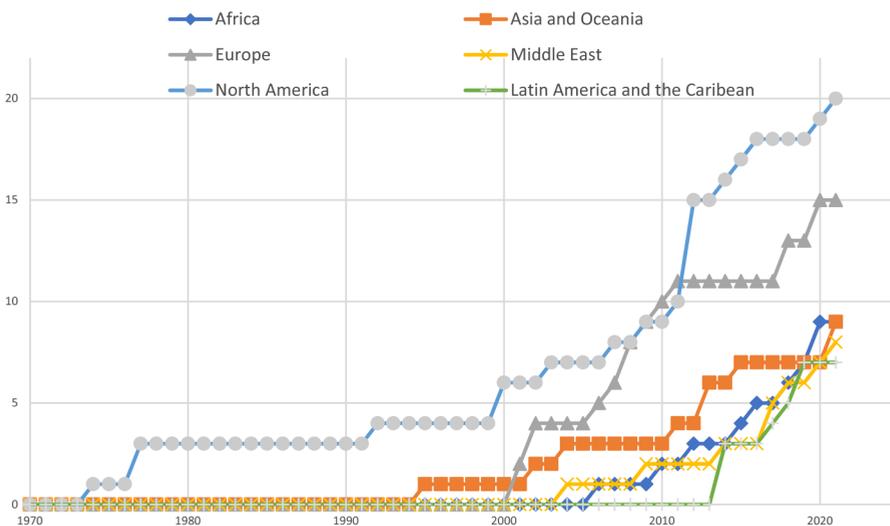


Figure 2. Distribution of publications analysed by region.

Source: Developed by authors.

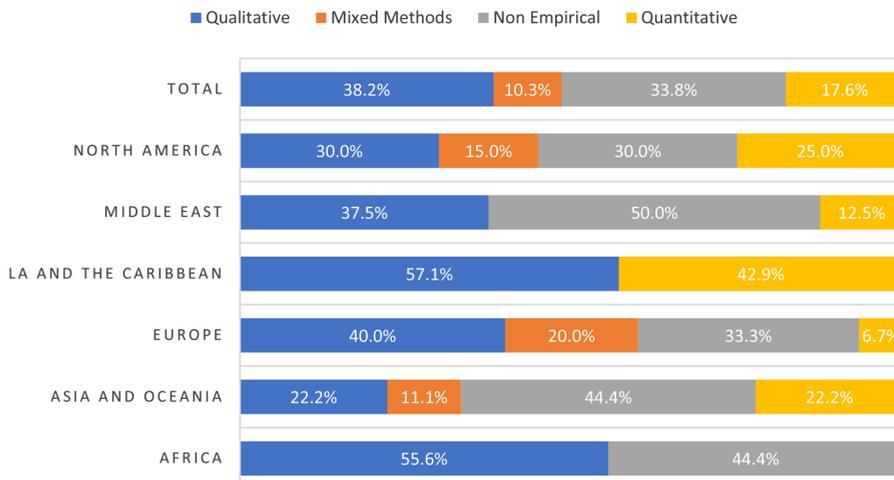


Figure 3. Distribution of publications in percentage by methodology and region. Source: Developed by authors.

Fuller et al., 2016; Goldring et al., 2021; Grissom et al., 2021; Martínez et al., 2021; McIntosh, 1974; Sperandio, 2010; Yeakey et al., 1986). As compared to gender, fewer studies have addressed the underrepresentation of ethnic minorities and these have largely been located in the Global North (Bush et al., 2006; Miller and Callender, 2018); with some exceptions, as for example the work of Bush and Moloï (2008) in South Africa and Miller (2014) in Jamaica.

Second, perceived principal shortages have sparked interest in understanding why people enter and leave the post as well as why, in some schools, principal recruitment is a problem (Lee and Mao, 2020; Piggot-Irvine and Youngs, 2011; Rhodes et al., 2008; Snodgrass-Rangel, 2018; Stevenson, 2006). Frequent turnover creates leadership instability, which, in turn, negatively impacts school improvement (Gates et al., 2004). In a wide range of countries, studies have focussed on core push factors associated with increased job complexity and intensification, particularly in urban districts and high-poverty schools (Ahmed and Al-Dhuwaihi, 2020; De Andrade et al., 2018; Bush and Oduro, 2006; Gurmu, 2020; Roza et al., 2003; Ruiz-Tagle, 2019).

A third concern is policymakers’ emphasis on school effectiveness and improvement, particularly since the publication of studies showing principals’ critical role in school-level outcomes (Leithwood et al., 2008; Robinson, 2008). In this body of work, questions of recruitment, selection, and preparation are considered paramount to ensure a highly qualified principal in each school (Murphy and Hallinger, 1989, Pont et al., 2008). Growing global interest in leadership development is associated with successive large-scale educational reforms that view principals as a critical improvement lever (Bailey et al., 2021; Begley, 2008; Gumus et al., 2018; Gunter et al., 2016; Milton et al., 2020).

Fourth, reforms that promote school decentralisation and the wide adoption of distributed leadership have created new middle leadership posts that represent a pool from which potential principals can be recruited (Galdames et al., 2018; Huber and Hiltmann, 2010; Lipscombe et al., 2021; Onguko et al., 2012). Overall, this set of studies has focussed on whether, and why, teacher leaders and assistant /vice principals seek hierarchical advancement to the principal post (Avidov-Ungar and Arviv-Elyashiv, 2018; Guihen, 2018; Hirsh and Bergmo-Prvulovic, 2019; Oplatka and Tamir, 2009).

Complementary dimensions to examine pathways to the principalship

One finding of this review is that each of these four research concerns can only be fully understood by examining micro, meso, and policy levels because pathways are affected by subjective experiences, professional norms, and policy incentives and restrictions together. Factors within and among dimensions interact in ways that create multiple, highly contextual pathways to the principalship. Moreover, these interactions create gates that influence decisions regarding who will move along the school leadership pathways. Job seekers must navigate and negotiate selection criteria and seek opportunities to be recognized by employers (gatekeepers) as having the potential to become a principal, apply for, and accept a principalship if offered one (Davis and Bowers, 2019).

The micro: pathways to the principalship from a subjective dimension. The number of studies addressing factors influencing individuals' choices to transition from one post to another spiked over the last decade, although it has been present throughout the period covered. Increased interest tends to be associated with concerns about the continued underrepresentation of women, principal shortage, as well as the emergence of distributed leadership.

Moving from teacher to principal. Worldwide, most prospective principals are teachers (Huber and Hiltmann, 2010; Ribbins, 2008). Lee and Mao (2020), from a systematic review of studies examining motivations to enter the principalship in the United States, concluded that educators who applied for principal vacancies cited a desire to make a difference in education, to positively impact students, and to take on a personal and professional challenge. Acting on this interest, teachers pursue opportunities to interact with the principal and district-level administrators and take on additional responsibilities to develop and demonstrate their leadership and management skills (Greenfield, 1977a, 1977b; Myung et al., 2011). In some jurisdictions, prospective principals develop professional networks and engage in leadership positions in community settings that assist them in gaining access to the post (Ebot-Ashu, 2019; Sperandio, 2010).

There is also work examining why some potentially strong candidates for the principalship do not pursue the post. Push factors include work demands that impede an adequate work-life balance, viewing the role as incompatible with their professional orientation towards working directly with students, and inadequate salaries considering the workload (Crow, 1992; d'Arbon et al., 2002). An earlier study conducted with female teachers in Canada found that women who did not seek promotion perceived that the principalship would interfere with their home life in ways that impeded their balancing of these two realms of responsibilities (Mcintosh, 1974). In England, a later study found that 28 out of 30 women teachers were not considering a secondary principalship, viewing the role as incompatible with their pupil-centred values, working preferences, and personal lives (Smith, 2011).

Moving from middle leadership to principalship. In several countries, a range of middle leadership positions, such as assistant and vice principals, department head or subject, are found in schools (Arar, 2014; Farley-Ripple et al., 2012). Leadership-oriented experiences have shown to be a significant influence on applicants' success in attaining the principal post, thus graduates from pre-service preparation programmes have first sought middle leadership positions (Browne-Ferrigno, 2003; Daresh and Male, 2000; De Andrade et al., 2018; DeAngelis and O'Connor, 2012; Fuller et al., 2016). In Chile, just 20% of first-time principals lacked previous leadership positions in a school (Weinstein and Muñoz, 2014). Moorosi and Bush (2020) report that in several countries in the African continent longevity as a teacher rather than previous

leadership/administrative experiences is the basis for an appointment, a practice also reported in other jurisdictions (Miller, 2014; Oplatka, 2004).

An analysis of the selected studies shows three main differences when comparing middle leaders who see the assistant or vice principalship as a career versus their peers who want to advance to the principalship (Bush, 2018; Guihen, 2018). First, they differ with respect to their professional orientations, with those seeking to move adopting a future-oriented and strategic-minded approach to leadership, perceiving deputy principalship as limiting their decision-making power, and wanting more autonomy to exert influence on the school's development (Armstrong, 2012). Second, assistant principals and associate vice principals who prefer to stay are satisfied with their middle leadership role (Armstrong, 2012; Farley-Ripple et al., 2012; Guihen, 2018). Female deputy principals in Israel did not aspire to the principalship because they wanted to remain closer to the instructional core (Oplatka and Tamir, 2009). Third, they differ in their assessment of the managerialist demands placed on principals. When the principalship is perceived as involving work overload, stress, even health problems, usually having to fulfil the responsibilities at the expense of family and personal time, middle leaders are deterred from seeking a principal post (Arar, 2014; Smith, 2011). Other studies suggest that performance targets diminish job security thus making the post less attractive in countries as different as Brazil (De Andrade et al., 2018) and the United States (DeAngelis and O'Connor, 2012), among others.

A normative assumption in the career path literature is that individuals make a personal decision to seek a principal post. Our review generally supports this claim; however, there are other possible paths. Ribbins (2008) noted that among principals in China, they reported playing little or no active role in the processes by which they were appointed to this post. A more recent study conducted in Lesotho, reported that teacher agency was denied when authorities instructed teachers to assume the principal post (Komiti and Moorosi, 2020). In Chile's rural schools with low enrolment and staffed by two to three teachers, one of them is appointed as the 'teacher in charge' out of necessity but without going through a selection process (small schools do not have the principal post). The EDLM journals scoped have not systematically addressed this pathway, which is most often reported in books or book chapters.

The meso: pathways to the principalship from a pre-service preparation dimension. The spike in interest is observed in the 1990s, with most publications on pre-service professional development (LPD) concentrating in the 21st century, tends to be associated with concerns about the principal as a school improvement lever. The central argument for introducing LPD pre-service strategies lies in three assumptions: (a) leaders matter for school success, (b) leaders need preparation, and (c) teaching experiences are not sufficient to fulfil the demands of the principalship (Bush and Oduro, 2006). These assumptions would suggest that the principalship understood as a profession entails a core set of skills and abilities that are learned via formal preparation.

According to Brundett's (2001) historical analysis, long-standing, specific attention to pre-service leadership preparation is a tradition almost exclusive to the USA. Our review confirms his conclusion, as the vast majority of contributions over the last five decades on this subject come from this single country. The expansion of LPD research advanced gradually across the globe, with an apparent consolidation of LPD requirements in recent decades. For example, in Hong Kong, LPD research appears since 2004 (Ng, 2013), in New Zealand since 2008 (Piggot-Irvine and Youngs, 2011), and in Chile since 2010 (Montecinos et al., 2015). This expansion is associated with an increased global, albeit problematic, consensus on what leadership

practices will produce good school-level outcomes, which are codified in professional frameworks that orient LPD (see AITSL in Australia; OLF in Ontario; PMDS in South Africa; MBDLE in Chile).

Whose job is it to provide pre-service principal preparation? This question asks where the knowledge for professional development resides: in the field or the university. In Ontario, Canada practising administrators teach professional development courses of about a semester in length to prospective school leaders who meet the other experience and credential requirements to be hired as principals. The 'Principal's Qualification Program' is offered by a range of providers, from continuing education departments of universities to the Ontario Principals' Council (Murakami et al., 2014). In the USA, the administrative credentialing process proceeds mainly from master's programmes offered by a university but alternative routes are reshaping the provision of pre-service and in-service preparation. In California principal aspirants can earn the preliminary administrative services by passing the 'California Preliminary Administrative Credential Examination Programme', thereby avoiding the preparation programme route entirely (Davis and Darling-Hammond, 2012).

In some jurisdictions, leadership preparation programmes are limited to selected, government-certified institutions; in others, these programmes are unregulated. A central challenge for leadership development in Latin America is the lack of coherence between the national policies that define the principals' work priorities and preparation programmes for those who will become school principals; certification is a way to address this problem if this is then considered in hiring decisions (Galdames et al., 2018). For example, in Chile, only those enrolled in a government-certified programme are eligible for a state grant to cover programme fees but prospective principals can get advanced preparation offered by non-certified programmes and hiring requirements do not consider a programme's certification status. Romanowski (2017) examined incentives inherent in pursuing (foreign, USA-based) programme accreditation for a leadership preparation programme in one Gulf Cooperation Council country. His study draws attention both to the accreditation 'industry' and to the ways that it legitimises certain (USA, Western) dimensions of school leadership while neglecting or ignoring other dimensions that might be more relevant to the cultural and political context in which these principals will work.

Strategies. Barnett et al. (2000) explored centralised university-based cohort approaches to LPD which is associated with increased likelihood of securing a principalship post preparation, enhanced learning opportunities through peer-interaction and networking, and professional relationships between students and faculty. Several authors advocate for district-based preparation programmes, often in partnership with a university or other type of external organisation. Under the banner of 'grow-your-own' (Joseph, 2009: 35), international evidence shows the importance and the benefits of preparing future leaders who already work in the district's schools on the assumption that planned succession will minimise problems associated with transition into the role or with the arrival of a new principal (Rhodes et al., 2008).

The grow-your-own path tends to be selective programmes that provide learning opportunities at schools in the district, with the expectation that participants will eventually apply to a principalship. A central requirement for this form of preparation lies in the strategic capacity of individual schools or local authorities to accurately assess their current and future leadership needs (Rhodes and Brundrett, 2006). One of the most cited benefits of this approach is that the cost is frequently lower than traditional off-site professional development (Joseph, 2009). A reputation-driven, grow-your-own model may strengthen organisational leadership development, but it can also by

its very nature lack transparency or simply reinvest in the status quo. The question of whether insiders can transform the organisations that have socialised them is under-explored in this literature.

The evidence consistently highlights the role of mentoring as a powerful strategy to identify and develop future leaders (Connolly et al., 2002; Ehrich, 1995). Mentoring provides personally tailored learning experiences for prospective principals by a senior leader, particularly by a principal. In Singapore, part of prospective principal preparation has relied upon eight-week immersive internships to the school led by their mentor (Bush and Jackson, 2002). Mentoring has been found to increase professional capacity as well as foster commitment to the pathway as prospective principals develop self-efficacy beliefs about their abilities to perform this work well (Rhodes et al., 2008). Informal mentoring both relies upon and develops principals' social capital but is susceptible to the risks of exclusion and opportunity hoarding that disadvantage gender and ethnic minorities.

Other sources of leadership preparation. In their study of school leaders' socialisation in Botswana, Lesotho, Namibia, and South Africa, Moorosi and Grant (2018) found that when LPD is not available, main resources for leadership development are grounded in four types of experiences: (a) early domestic activities (i.e. herding livestock) and schooling, (b) teacher education, (c) in-house and self-taught preparation once appointed, and (d) participation in community initiatives. These other sources of principal socialisation and preparation have also been reported by Bristol et al. (2014) in Trinidad and Tobago. These other types of leadership development experiences have been under-researched in countries that rely on formal preparation, therefore their potential to complement and resource formal preparation has received little attention in the EDLM journals reviewed.

The macro: the principal pathway from a policy dimension. In this section we note that a similar set of key policy questions about the role of school principals and the pathways to that job are taken up differently in different jurisdictions. We are informed in our approach by Cochran-Smith and Villegas (2015: 382) who, in their examination of the research on teacher preparation over the past hundred years, posited that 'the key idea here is that research questions (and problems) do not exist 'out there,' simply waiting for researchers to discover them and take them up. Rather questions are deliberately constructed by researchers in keeping with their major assumptions'. Through an analysis of job descriptions for the recruitment of principals in Wales, Milton et al. (2020: 13) make a related point by noting that principalship is framed 'in a way that aligns with a centrally-prescribed, organizationally-inflected understanding of headteachers' professional work'.

The policy environment shaping principal pathways, whether explicitly or implicitly, responds to a small number of core questions, among them: *is a school principal an educator? Does a school principal require special preparation and credentialing?*

Is a school principal an educator?. This question asks whether school principals are/should be education insiders or outsiders. Licensure rules for principals, where they exist, often require a teaching credential and teaching experience (and in some places, the teaching credential is enough—there is no explicit regulation about teaching experience). In some jurisdictions, principals and teachers are part of the same union, suggesting a shared role as educators. However, in other jurisdictions, no teaching experience is required and candidates from outside the school system are allowed, whether because of administrator shortages or because of assumptions about the value of business or other 'real world' experience. Romanowski et al. (2020) note that teaching experience is not required in Qatar but both teaching experience and school middle leadership

experience are expected in the UAE. Flessa et al. (2018) delineates the varying policies in 7 Latin American countries; in 6 teaching experience is required.

Does a school principal require special preparation and credentialing? As Weinstein et al. (2018: 230) notes 'Unless one believes that school leaders can innately and spontaneously affect quality leadership, and must therefore only be properly selected, preparation and support are a key to help school leaders develop the required competencies'. Murphy (2020) notes that formal leadership preparation is not required for either senior or middle leadership positions in Ireland, but that 'would be almost impossible to secure a senior leadership role without engaging in formal leadership preparation' (p.3). Unfortunately, as Alhouthi and Male (2017) note in their study of Kuwaiti principals, just because leadership preparation and workshops are expected does not mean that principals find them useful. Our scan of the EDLM research suggests that in systems with formalised preparation requirements as well as in those without this requirement, the utility and impact of courses is at best ambiguous making 'best practice' studies an important subgenre (Darling-Hammond et al., 2007). Furthermore, a question posed by Cowie and Crawford, namely whether pre-appointment preparation programmes 'do any good'. (2007: 132) cuts across countries and time (Flessa et al., 2018)

Some jurisdictions tap teachers to be school principals without a formalised process for professional development and selection. For example, as Amakyi and Ampah-Mensah (2019) note, 'those who are appointed school heads in Ghana are usually selected from the ranks of teachers' (p.153) under 'an operating assumption that good teachers can become effective school heads without specific academic preparation in administration' (p.154). Where tapping teachers, many without previous administrative/leadership experience, to take school principalship roles is prevalent, it stands to reason that one place to do leadership preparation work would be in initial teacher education, as suggested by Komiti and Moorosi (2020) when addressing this topic in Africa. In places where formal LPD is not available, researchers conclude that structured and proactive approaches to leadership preparation are also necessary, thus policies for greater investment in principal preparation are required.

Gatekeeping. Another core difference is who initiates the school leadership pathway, and with what criteria. Much of the literature from the Global North tells a leadership pathway story where a range of push and pull incentives (higher salary, mentorship/encouragement, interest in greater responsibility/influence, sponsorship) prompt educators to embark on the formal learning necessary to undertake school administration, culminating with applying for a job (Mentz et al., 2010; Onguko et al., 2012).

Alongside sponsorship, teachers and other middle leaders report being provided and/or finding opportunities for middle leadership work or being nominated by a supervisor for professional development opportunities in leadership (Avidov-Ungar and Arviv-Elyashiv, 2018; Gronn and Lacey, 2004; Trnavčević and Roncelli Vaupot, 2009). Both types of activities aid in understanding leadership and themselves as potential principals to inform their decision to move (or not) forward.

Formally and informally recruiting teachers to join the school principal workforce can involve contest mobility where each candidate's success depends on his or her merits as assessed in competitive but closed-door processes or sponsored mobility under which certain teachers are recruited for an accelerated pathway to the principalship (Tomlinson and Holmes, 2001). Gooden and Gonzales (2012) describe a university preparation programme in the United States that begins by asking local district leaders to nominate individuals who have purportedly exhibited a set of

desirable leadership experiences and commitments as well as inviting local teachers interested in the principalship.

Dimmock and Tan (2013) noted that at that time, school leadership in Singapore was one of three educator pathways and it was the system, not the educator, who decided who embarked on the leadership pathway—the system was ‘growing its own’ leaders under quite strict conditions and did not delegate that responsibility to non-system actors. The situation is changing and at this writing individuals seeking to be appointed to a vice-principal post can apply for the position if they have, among other requirements, ‘at least 10 years of general management experience including a minimum of 5 years in a leadership position’. (MoE, 2021).

The significant body of work from the Global North on the ways that leadership pathways can be inequitable and exclusionary for women and educators from racial minority backgrounds evidence how hegemonic understandings of who ‘looks /acts like’ a leader shuts the door in systematic ways to qualified applicants (Goldring et al., 2021). Research studies show that in some regions of the Global South even though highly formalised policy might exist, in practice candidates report a lack of transparency in the leadership pathway leading to the appointment of many unqualified principals (Lumban, 2021; Sumintono et al., 2015). In jurisdictions such as South Africa (Mampane, 2015), Turkey (Kılınç and Gümüş, 2021) and West Africa (Bush and Glover, 2016; Oplatka, 2004) contest mobility is in the policy. Those studies also report that stipulated appointment processes, however, are subject to influences unrelated to a candidate’s professional merits. In Chile, pursuing a principalship requires an entrepreneurial professional who self-initiates his or her pathway, navigating their way in a process in which both experienced and inexperienced candidates must compete at their own peril (Ramírez, 2017). Although there is a clearly stipulated transparent selection process with formal criteria to judge candidates, evidence shows that candidates perceive political patronage as playing a significant part; hence, they perceive a lack of transparency (Donoso-Díaz et al., 2019; Ruiz-Tagle, 2019).

Conclusions and topics for further research

Using the 50th anniversary of EMAL as a motivation to review a particular body of scholarly work from the last half-century we have taken a disparate, international body of work on the pathway to the principalship and sought to understand concerns that drive this work, factors that shape who and how people in different countries may access the principal post and implications for further research. To the extent that scoping reviews take ‘snapshots’ of a specific corpus of studies, a limitation of this approach is that deep dives into each of the themes emerging from the analysis are precluded thus the theoretical, political, or philosophical foundations of the topics are not explored. Conducting a scoping review, however, served the aim of mapping research topics on three dimensions of the pathways that have often been studied separately. This review is limited to an analysis of the pre-entry stage of the pathway, therefore, the dynamics of professional career choices over time were not explored. To the extent that this review draws on articles published in English or Spanish, an unknown number of perspectives from nations where neither English nor Spanish is used in academic and policy work have been omitted.

Across the years covered by this review, we observe some shifts in the concerns driving research on this topic. Earlier, in the 1970s researchers concerned with equity sought to understand the underrepresentation of women and ethnic minorities; this concern remains as these groups still face systemic barriers in jurisdictions around the world. Beginning in the 2000s as interest in school effectiveness highlighted school leadership broadly and the principal in particular and

educational reforms took a managerial turn on principals' work, several of the studies reviewed addressed pathways issues to identify emerging challenges in recruiting and preparing principals. With studies advocating for distributed leadership came an increased interest in teacher leadership and middle leadership as pathways to the principalship, focussing on push and pull factors as well as on policy. Attention to different research drivers shows that questions about pathways to the principalship vary over time in response to broader local and global questions about educational quality, social attitudes about issues of equity, and conceptual shifts in how school leadership is understood and developed. Moreover, drivers illustrate how policymakers represent the nature of the 'education problem' and appropriate policy solutions. What old drivers will remain and new ones emerge over the next 50 years?

Findings also show that at the micro-level push and pull factors for pursuing this path have remained fairly similar across years and across countries, clustering around issues of professional orientation, work-life balance, and perceived attractiveness of the principalship relative to other leadership roles. The principalship allows teachers and assistant principals to influence educational improvement and increase their salaries and benefits. Time demands of the position deter potential applicants. Individuals' interest in the post interacts with meso and macro factors as they must negotiate and navigate gatekeepers and gatekeeping, such as applying and being admitted into a preparation programme and obtaining a sponsor who recognizes them as a potential successful principal. How much sponsorship plays in accessing the post varies across countries, as well as the extent to which sponsorship is part of the explicit path or part of a covert, non-formal path (Avidov-Ungar and Arviv-Elyashiv, 2018; Greenfield, 1977a). To the extent that someone in a position of power decides who 'looks/acts' and does not 'look/act' like a principal in the making, formal and informal sponsorship present potential for inequitable access based on candidates' race, gender, religious affiliation, among others (Davis and Bowers, 2019; Miller, 2014). Understanding how, across different countries, gatekeepers recognize and tap prospective principals, what are the characteristics considered desirable as well as how culture and policies shape these practices, can reveal how inequities in access are interrupted as well as perpetuated (Tomlinson and Holmes, 2001).

Much of the research on the subjective dimension is based on a normative conception that becoming a principal is a voluntary process but because the 'non-voluntary principal' is an under-researched topic, we know little about whether it is prevalent and nuanced in different jurisdictions. Additionally, as career choices result from an interplay between structures and agency, further research could explore how this particular group of principals make sense of the post and themselves in that post. This finding suggests the need for more empirical work on alternative pathways to the principal post. Are there other pathways that have been under-researched or not taken into consideration?

Writing in 1989 about changes in the preparation of school administrators, Murphy and Hallinger (1989) noted that the sources of pressure for change had evolved over time from the professoriate in the 1950s to sources from outside the universities in the 1980s. In the current review, we observed that the principalship, and what is required to be appointed, are framed by how governments prescribed notions of school leadership, management and administration, though locally these prescriptions are adapted rather than adopted (Milton et al., 2020). Stevenson (2006) highlighted how increasing uncertainty and the rapid pace of change were creating new pressures and tensions for the work of school leaders and their career paths. The COVID-19 pandemic evidenced that schools must now operate in a society characterised by increasing volatility, uncertainty, complexity, and ambiguity. The exacerbation of these pressures suggests the need for further study of the kinds of leadership needed and how

they might come to affect interest in the post, leadership frameworks, and LPD in the short and long term (Horney, Pasmore, and O'Shea, 2010).

An analysis of the formal preparation pathway shows variations across countries not only in terms of whether it is required but also whether it is available. When available, LPD varies from highly prescriptive by a centralised authority (e.g. Singapore) to decentralised and marketised by a range of providers (e.g. Chile). Where pre-service preparation is lacking, role socialisation occurs on-the-job and/or through experiences as community leaders (e.g. in some African countries). These kinds of leadership development experiences have been scantily addressed as noted earlier by Ribbins (2008) when arguing that prospective principals are socialized by key agencies as family, school and the local community.

One of the challenges of making sense of the principal pathway research over time and across countries is the fact that the taken-for-granted policy structures in one jurisdiction (licensure requirements, for example) may not only be different but totally absent in another. One way of illustrating this challenge is to examine the research on leadership preparation programmes, a large body of work mostly from the USA, which assumes policy machinery of regulations, incentives, and infrastructure lacking in vast regions of the world. Taking for granted this kind of policy infrastructure neglects other research questions to understand and harness the range of formal and informal practices that prepare prospective principals to lead and manage a school (Moorosi and Bush, 2020). Further studies are needed to understand leadership development through formal and informal processes and the set of competencies developed through different socialization practices. For example, considering the need for today's educational leaders to be adequately equipped to work with a diverse student population, further research could explore how involvement in community-based leadership activities enables the development of competencies associated with a social justice leadership framework (Miller and Martin, 2015).

A recent systematic review of EDLM research published in comparative education journals between 1995 and 2018 (Flessa et al., 2021) found that 68 from a total of 109 articles pertained to what they called the 'leaders' trajectory'. That review also found that most of the EDLM articles published in comparative education journals were single-country studies. The current review on pathways to the principalship illustrates that understanding of who principals should be and how they should arrive at the role remains highly contextual, despite a tendency for a normative managerial dimension that has increasingly spread in policies worldwide. Further research could explore whether and how changes in policy provisions charting pathways to the principalship effectively address the evolving needs identified by school communities.

One overall conclusion is that the main drivers for research on the pathways to the principalship suggest that the principalship is often understood as a component of the solutions to a number of educational problems related to equity in access and quality. Put differently, the principalship is part of political projects competing to frame the field of education in general and school leadership in particular (Gunter, 2004; Milton et al., 2020). As educational systems face new challenges and school leadership models evolve, further research could explore how the principalship is framed as a solution in the context of new challenges as well as the implications for developing career pathways.

A second overall conclusion is that cross-national thematic comparison or synthesis articles like this one highlight taken-for-granted, normative stances that limit the kinds of questions and the possibilities for understanding why people move to a principal post, what kinds of preparation best serve them to address the needs of the schools they lead, and how policies create opportunities and constraints for prospective principal's agentic actions. To advance our collective understanding of the pre-entry stage of a

principal's career path, normative assumptions should be uncovered and critically challenged to address push and pull factors in each country as well as across countries and regions.

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