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Leaving fingerprints: principals' considerations while implementing education reforms

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Abstract

Purpose – Turning an education reform program into school reality greatly depends on the principal. In certain cases, principals choose to implement reform instructions only partially. The purpose of this paper is to explore school principals' considerations leading to their decisions not to fulfill a national reform's guidelines in a full and complete way.

Design/methodology/approach – This qualitative study is based on interviews with 59 school principals. Generating themes was an inductive process, grounded in the various perspectives articulated by principals.

Findings – Data analysis yielded three major considerations: adjusting to school reality; caring for teachers; and using discretion.

Research limitations/implications – Longitudinal studies in order to explore how principals' considerations and mediation strategies evolve and unfold throughout the reform implementation would be useful. The authors suggest complementing principals' verbally expressed perceptions with more objective measures such as direct observations (recorded on video and then reflected upon), to evaluate their considerations and mediating strategies.

Practical implications – Providing prospective and in-service principals with leadership education programs in order to develop an upgraded understanding of their role as mediating agents between the inner and outer spheres of school-life.

Originality/value – As principals serve as mid-level policymakers who leave their "fingerprints" on policies received from the authorities, exploring these considerations may contribute to both the scholarship and the practice of the leadership role in times of education reforms.

Keywords Principals, School reform

Paper type Research paper

Introduction

The aim to ensure all children's access to high quality education, together with the belief that the strength of society and economy is inextricably linked to that of the national school system, motivate many countries worldwide to carry out education reforms (Addonizio and Kearney, 2012; Anderson *et al.*, 2015). Thus, large-scale education reforms focusing on reorganizing the entire school system rather than on merely implementing individual school improvement initiatives have become one of the main characteristics of current education systems (Robinson and Aronica, 2015).

For those interested in improving education reform implementation, it would be advisable to focus not merely on what is implementable and what works, but rather on the interactions between policy, people and places. Thus, "contemporary implementation research specifically aims to uncover [...] how and why interactions between these dimensions' shape implementation in particular ways" (Honig, 2006, p. 14). In this context, school principals, as those who ultimately implement education reforms, deserve special academic attention.

Research findings point to the decisive impact of school principals on the execution of education reforms (Spillane and Kenney, 2012). Turning policymakers' visions into school reality greatly depends on the principal (Levin and Datnow, 2012). Basically, school principals adhere to external guidelines; nevertheless, they often serve as mid-level



policymakers who leave their fingerprints, so to speak, on policies received from above (Flessa, 2012). Finding themselves at the cross-roads of differing interests and agendas of various actors in and around the school, principals oftentimes implement a large-scale reform incompletely, determining which parts of it they might introduce into the school and which they prefer to filter out (Diamond, 2012; Seashore Louis and Robinson, 2012).

The focal purpose of this study was to explore elementary school principals' perceptions when they make a decision not to fully implement the national reform's guidelines. Thus, the research question guiding the study was as follows:

RQ1. What are the considerations leading school principals to decide to fulfill the guidelines of a national reform only partially?

Exploring these considerations may contribute to both scholarship and practice of leadership in times of education reforms (Derrington and Campbell, 2015; Hallinger and Lee, 2013; Park and Jeong, 2013). We turn next to the study's conceptual framework, which is grounded in the literature on school principals' role during education reforms.

Theoretical background

School principals' role during education reforms

School principals have a pivotal role in the implementation of national education reforms (Flessa, 2012). Effective results of an education reform aimed at transforming schools into more beneficial institutions depend not only on the reform being properly designed, nor on its conceptual foundations, but also on its successful realization by principals who lead the process in their schools (Gawlik, 2015; McDonald, 2014; Sahlberg, 2011; Young and Lewis, 2015). School principals may be the linchpin of effective implementation of any school-level reform (New Leaders, 2013). Therefore, without school principals who effectively lead reform implementation, there is little chance for sustained change in schools (Bryk *et al.*, 2010).

Education reforms have broadened school principals' roles (Pont, 2014; Schleicher, 2012; Sumbera *et al.*, 2014), which have surely become more complex in recent years (Fullan, 2014). Principals are presented with reforms as a means of maximizing school performance, and are required to support and develop teachers and other staff members accordingly, setting clear goals, and above all ensuring that their schools deliver a high quality education (Gawlik, 2015). In particular, principals are engaged in multiple contexts – state, school district and parent associations. This intersection of internal school goals and external reform demands is a central concern for school principals, as it brings into question common practices and challenges the existing state of affairs (Kaniuka, 2012; Knapp and Feldman, 2012).

The intersection of internal school goals and external reform demands can be interpreted as a problem of institutional response, rather than implementation or compliance with external policy demands. The effectiveness of an external policy depends not on how well principals implement it, but rather on how they respond to the demands the policy puts in place in their environment (Elmore, 2006). Thus, principals are not passive or active players, but rather operate in a more strategic frame to position themselves and their organizations in a favorable place as an instrument for developing organizational coherence (Fullan, 2014). To achieve strategic leadership, school principals must make sense of their role, responding to the dynamic interactions between internal school goals and needs and external reform demands (Saltrick, 2010; Weick, 2009). This sense-making process re-centers principals' role as local policymakers (Rice, 2010; Spillane and Kenney, 2012) and mediating agents who develop adaptive strategies (Maxcy *et al.*, 2010).

School principals as mediating agents during education reforms

A school principal may be seen as the one who stands at the school doorstep, between the extra- and intra-school worlds (Kelchtermans *et al.*, 2011). Internal and external stakeholders

often have different, and even incompatible, goals, desires, views, expectations and demands (Ewy, 2009). Thus, seeing principals as mediating agents who must walk the tightrope between inside desires and capacities and outside demands and expectations, may serve as a conceptual frame for capturing some of the particular complexities of their work (Seashore Louis and Robinson, 2012).

As a mediating agent, the school principal often determines whether the school will work by bridging or alternatively by buffering external influences (Kohansal, 2015; Maxcy *et al.*, 2010; Paredes Scribner, 2013; Rutledge *et al.*, 2010). Rooted in organizational and institutional theory, the concept of bridging and buffering has been utilized by researchers to explain the complex relationship between educational institutions and their environments (Johnson *et al.*, 2015; Su *et al.*, 2014). Organizations respond to external influences in two basic ways: they either conform to them, increasing coordination and information flow, or they try to insulate themselves from these influences, treating them as threats (Gössling, 2011). The bridging strategy seeks to adapt organizational activities in order to conform to the expectations of external stakeholders, thus emphasizing the organization's openness to change. Put simply, bridging promotes the organization's internal adaptation to external circumstances. In contrast, buffering is an activity aimed at preventing external factors from interfering with the organization's functioning. Organizations using the buffering strategy try to either control or resist the external environment (He *et al.*, 2007).

Bridging and buffering do not represent two opposing options of either totally meeting external demands or totally rejecting them; external demands may also be partially accepted or modified. If they are basically accepted while being adjusted to the school reality, their incomplete implementation can be regarded as bridging. However, if they are implemented only superficially, without internalization and real change, this would be regarded as buffering, which is "not the blind dismissal of external demands but strategically deciding to engage external demands in limited ways" (Honig and Hatch, 2004, p. 23). In many cases there is only a slight difference between the two options. Therefore, this twofold bridging-or-buffering approach could be conceptualized via principals' creativity in implementing external-national demands in accordance with their own educational discretion, thus taking the two stances alternatively at different moments or toward different elements of the external demands (Hall and Hord, 2015).

Principals' creativity and adaptive strategies become more crucial and complex during periods of education reform (Rutledge *et al.*, 2010). Such reform usually involves a barrage of external demands, which requires the school leadership to decide whether it wishes to truly undergo a process of change under the reform, or rather find ways of getting around it, effectively closing the school to change and maintaining existing practices (Murphy and Torre, 2013). Moreover, in recent decades many large-scale education reforms have set clear, measurable standards for what students need to know and be able to do (Desimone, 2013). Reforms often involve creating curriculum frameworks that outline specific knowledge and skills which students must acquire, emphasizing the use of tests suited to assessing student progress (Carbonaro and Covay, 2010). The policy of setting standards has arisen from the need to ensure efficiency, equity and quality of education in order to solve economic and social problems (Yarovaya, 2015). The standards environment, which leaves little room for the school's values, goals and capacities, makes it even more complicated for the school principal to negotiate external pressures with local preferences and abilities.

In this reform context, principals mediate between external authorities and the school, adapting and incorporating particular policy elements and practices, creating new norms that alter the original reform plan over time (Diamond, 2012; Seashore Louis and Robinson, 2012). Thus, different schools may relate to the same policy in different ways in terms of content, focus, and intensity (Levin and Datnow, 2012; Koyama, 2014). Moreover, school principals often interpret reforms creatively; thus they should not be regarded as mere

gatekeepers (Salter, 2014), but rather as mid-level policy managers who leave their “fingerprints” on policies received from above (Flessa, 2012). That is to say, principals unofficially become local policymakers who play an active role in adjusting external reforms to suit their particular situations (Spillane and Kenney, 2012). Thus, reforms are not only a top-down process; in fact, agents at all levels (e.g. district officials, principals, middle leaders) contribute to this process (Levin and Datnow, 2012). In this regard, Brewer and Carpenter (2012) suggest the term “savvy participants” to describe the many actors who actively, although generally implicitly, negotiate reform implementation in light of schools’ particular needs and capacities.

In order to reduce incoherence resulting from differing external and internal agendas, two dominant strategies have been proposed: outside-in strategy, which sees policymakers as the source of the solution to this incoherence; and inside-out strategy, which sees schools as the source of that solution (Seashore Louis and Robinson, 2012). The outside-in strategy claims that making fewer and better-designed reform demands on schools results in increased coherence. However, according to the inside-out strategy, increased coherence is achieved by employing a policy framework that provides leaders with considerable discretion as to the way by which they will meet broad policy goals (Youngs *et al.*, 2011). Honig and Hatch (2004) argue that a third approach is needed – one that treats coherence as a process that “requires school and school district central office leaders to work in partnership to continually ‘craft’ or ‘negotiate’ the fit between external demands and schools’ own goals and strategies” (p. 17).

During a reform period principals have to craft coherence out of multiple and competing demands on the one hand, and school personnel capabilities on the other, considering the better path to pursue (e.g. Baglibel *et al.*, 2014; Gawlik, 2015; Hall *et al.*, 2013; Hallinger and Lee, 2013; Honig and Hatch, 2004; Kelchtermans *et al.*, 2011). Therefore, the goal of this study is to explore principals’ considerations when deciding not to fully implement the guidelines of a national reform.

Research context

The current study focused on school principals in Israel. The New Horizon (In Hebrew: Ofek Hadash) national reform was initiated in 2009, and is being implemented in elementary schools, encompassing many aspects of school-life. One of the elements of the reform was structuring teachers’ work: teachers’ educational-pedagogical work was reorganized and diversified to include frontal teaching, individual teaching, and non-teaching hours. The individual teaching hours, which did not exist in the teacher’s schedule before the New Horizon reform, are intended mainly for working with groups of up to five students, enabling personal tutoring which promotes scholastic achievements and nurtures teacher-student connections. Non-teaching hours, which did not exist either in the teacher’s schedule prior to the New Horizon reform, are intended mainly for work that teachers used to do at home. These hours provide time for the educational staff to carry out various school-related tasks, such as planning classes, meeting among themselves, professional development, and communication with colleagues and stakeholders (parents, experts, etc.). To ensure teachers’ compliance, the teachers’ lounge now features a computerized time clock, and teachers must register their swipe card. Additional elements of the reform were an increase in teachers’ salaries; a change in teachers’ professional development and how they are promoted; institutionalization of a standard system for evaluating educational staff (teachers, vice-principals, principals); and improvement of teachers’ physical work environment, in particular the construction of suitable work areas for them (Israeli Ministry of Education, 2012).

At first, many teachers felt they were not being treated as partners in the process of reform; rather, they felt they were being used as pawns who must simply accept the reform as is and implement it as they were told without asking questions (Reichman and Artzi, 2012). Teachers’ resistance to the upcoming reform resulted in a 64-day teachers’ strike in 2007,

the longest strike in the history of Israel's education system (Berkovich, 2011). Although several years later some teachers reported that the changes brought about by reform implementation were positive (Zach and Inglis, 2013), in the initial stages it was school principals who had to deal with many teachers' fierce opposition to them.

Research design

We chose a qualitative methodology to facilitate the collection of rich textual descriptions of the complexities involved in the way different people experienced the given issues and situations stemming from the education reform. In particular, this study is a narrative inquiry into meaning, while being attentive to what principals are experiencing at the moment (Patton, 2002).

Participants

Seeking to maximize the depth and richness of data, we used maximal differentiation sampling (Creswell, 2014), also known as heterogeneous sampling. This is a purposive sampling technique used to capture a wide range of perspectives, gaining greater insights into a phenomenon by contemplating it from various angles (Merriam, 2009). The maximal differentiation sampling was implemented in this study regarding principals' gender, years of teaching experience, years of experience as principal in general, years of experience as principal in the current school, and geographical districts. We did not begin the study with a rigid number of participants. In fact, we defined the study sample on an ongoing basis as the study progressed (Taylor *et al.*, 2016). In practice, we approached 81 school principals, until we obtained 59 principals who could represent diverse sampling. Thus, the 59 participating elementary school principals (38 women, 21 men) who implemented the national reform were from all school districts. On average, participants had 22 years of teaching experience (range = 7-43), and eight years of experience as principals (range = 1-36). Participants had three years of experience as principals in this national reform.

Data collection

Data were collected during the second semester of the 2012-2013 academic year. Three exploratory interviews were conducted in order to formulate a protocol for a semi-structured interview designed to explore participants' personal perspectives (Rossman and Rallis, 2012). The proposed protocol, then, was reviewed by two experts on educational leadership, and was revised in line with their recommendations. During the semi-structured interviews, principals were asked to retrospectively reflect on their role throughout the implementation of the national education reform, through questions such as: "What does the reform mean in terms of your role as principal?"; "Which factors promoted or inhibited the implementation of the reform?"; "Throughout the reform implementation process, which were the factors that significantly influenced your decisions?" Individual interviews with principals generally lasted one hour. They were conducted in places chosen by interviewees: their schools, cafes, and other locations. All interviews were audiotaped and transcribed verbatim. Transcriptions were translated from Hebrew to English by a specialist in both languages. All participants were fully informed on the purpose of the study and were promised complete confidentiality as well as full retreat options. Pseudonyms were assigned to all interviewees.

Data analysis

Data collection and analysis were conducted simultaneously in an ongoing process throughout the research, with a four-stage analysis process – condensing, coding, categorizing and theorizing. Once data were collected, we found that not all of them could serve the purpose of

the study, so that it required sorting out (Miles *et al.*, 2014). Thus, in the first stage of analysis (condensing) we sought the portions of data that related to the principal's role, as this was the topic of the study. In the second stage (coding) each segment of relevant data (utterance) was coded according to the aspect of the principal's role which it represented (Tracy, 2013). In contrast to the previous stage, this stage was data-driven and not theory-driven, since we did not use a-priori codes but rather inductive ones, developed by direct examination of the perspectives articulated by participants (Rossman and Rallis, 2012). After capturing the essence of utterances in the second stage, we turned to the third stage (categorizing) in which we grouped similar utterances together in order to generalize their meanings and derive category definitions. We then proceeded to rework these definitions so as to reconcile disconfirming data with the emerging analysis (Richards and Morse, 2013). Thus, category dimensions were explored, testing them against the full range of data and identifying relationships between them. The fourth stage was theorizing, i.e. aiming to transcend categories and reach a unified conceptual construct (Richards and Morse, 2013), which we did by consolidating the categories formed in the previous stage in a variety of ways, until we realized how different components were interconnected and influenced each other as parts of a whole.

A confounding property of category construction in qualitative research is that data within the categories cannot always be precisely and discretely bound together; however, we grouped and regrouped utterances when their codes had common elements, until satisfactory categories emerged. It was somewhat like "decorating a room; you try it, step back, move a few things, step back again, try a serious reorganization, and so on" (Abbott, 2004, p. 215). Then we consolidated the categories we had established in various ways, until we realized how different components were interconnected and influenced each other as parts of a single conceptual construct. Charmaz (2006) explained this figuratively: "Coding generates the bones of your analysis; theoretical integration will assemble these bones into a working skeleton" (p. 45). Our analysis process as described thus far may be seen as an orderly and efficient process; in fact, it was quite complex and messy. We went forward and backward, and the various stages mingled with each other.

Several measures were taken at different stages of the study to ensure trustworthiness. First, the diversity of study participants was maintained in terms of gender, seniority in post, and geographical school districts. Second, the analytical process described above was conducted by the researchers, with each analyzing the data independently, then meeting to discuss and reflect on the emerging themes, and to search for data that would either confirm or disconfirm these themes. Third, to properly evaluate the soundness of the data, we also conducted a member check (Koelsch, 2013) with all participants' transcripts sent back to them along with a request that they evaluate their responses and make any necessary additions or modifications. Using this strategy allowed for an examination of the descriptive data vs participants' reactions, thus endorsing and solidifying principals' positions regarding their own leadership considerations while implementing the education reform. In total, 15 (out of 59) of the interviewees changed their answers at this point, clarifying their former remarks and adding things they forgot to say.

Findings

The current qualitative study has explored the considerations of elementary school principals regarding their decisions to refrain from fully implementing a national reform's guidelines. Data analysis yielded three major considerations: adjusting to school reality; caring for teachers; and using discretion. Although these considerations are distinct, they are closely interrelated in the context of implementing an education reform.

Adjusting to school reality

The first reason why principals decided to implement the reform only partially was their desire to fit the reform into school reality. They believed that although the reform principles

were generally good, sometimes it was necessary to deviate from them due to various practical circumstances. This notion was mentioned by 24 study participants. One of the practical difficulties in implementing the reform was a shortage of individual workspace for teachers. Due to lack of proper conditions, Jean, a Principal with four years of experience, decided to allow her teachers to work from home. Working from home is contrary to the Education Ministry's regulations; however, Jean considered her decision to be realistic in light of the existing conditions:

My teachers still lack appropriate individual workspace and at particularly pressured times I allowed them to work from home during attendance [school] hours. The key to success in implementing the reform is being flexible and not sticking to the dry letter of the law. From my practical perspective, it means being realistic and aware of the existing situation.

Contrary to the provisions of the reform, Jean allowed the teachers to work from home because they did not have suitable conditions within the school. In her view, in order for the reform to be successful, it should be implemented in a flexible manner. Jean's decision also reflects her consideration for teachers' needs, as will be presented below. However, it is based on the need to implement the reform in a way that is compatible with the school reality.

Regarding the allocation of individual hours, George, a Principal with 13 years of experience, was even willing to stand to trial for providing more hours than allocated per student. He struggled to keep his own judgment, a consideration that will be discussed below, and claimed that his decisions are "consistent with the school's reality," basing his argument on proven students' achievements:

I am ready to go on trial for having decided that a particular student will receive more individual hours than what the Ministry of Education has allocated him. My view is consistent with the school's reality and I have students' achievements to prove it. I am also ready to explain in case the balance between students' learning groups was interrupted, because I know what my students need.

Miriam, a Principal with 11 years of experience, considered effective and positive interpretation of the reform as akin to the ability to work magic:

I believe that a school principal is a magician. Although reform guidelines are laid out, the principal is constantly striving to understand what he is required to do with them. I need to look beyond black and white written guidelines, so I develop my own magic tricks in order to make it into something that works better for my unique school. For me, that's really being some sort of magician who believes in his own magic.

David, a Principal with 19 years of experience, sometimes decides to buffer some of the reform demands. In his opinion, the reform considers the school to be a simple linear system, while in fact it is much more complex. While seeing the teachers' needs, a consideration that will be presented below, he also pointed to some reform guidelines that were unrealistic:

Yet again the reform's complex structure proves to be problematic. When I decide to adapt it to the school's reality I feel I have to make significant deviations from its original format. For example, how can a drama teacher report that he arrives at school at eight a.m. when he does not? And when he ends rehearsals and preparations for matriculation exams at eleven o'clock at night, on which clock can he register that? The main problem with the reform is that it relates to our school world as though it were a linear system, while in fact it is quite dynamic and changes a lot.

Barbara, a Principal with five years of experience, did not require her teachers to participate in professional development courses. Although it is compulsory, she said it simply does not fit in with reality:

If the reform was really good and all the teachers were going to professional courses, it would really be worth it. But the sad reality is even worse than you can imagine. Teachers want to go and are

told that the courses are already full up, so I decided not to pressure them to go. I am aware that it's truly required according to reform guidelines, but it is just not realistic. It's like these reform planners from the Ministry of Education are actually giving us a car without gasoline.

Naomi, a Principal with 14 years of experience, said that over time she began to adjust the reform to her school:

At first I clung as tightly as I could to reform regulations and did not deviate from the accepted path. The regulations protected me by creating equality among the teachers so that there were no differences and this indeed prevented uprisings. After one year I began adjusting the reform to the school's needs and reality, becoming more flexible toward teachers whom I trust and less strict about formal regulations. For example, I signed teachers' earlier departures from school for the sake of their going to professional development courses.

To summarize, principals creatively bridged the gap between reform guidelines and school interests because they believed that the reform does not entirely fit in with reality. In general, they do see reform guidelines as basically worthy, but believe that they themselves should be authorized to adapt the reform to their actual circumstances. In addition to this, they also demonstrated the considerations of caring for teachers and using discretion, which are presented next.

Caring for teachers

Analysis of the current findings suggests that one more reason why principals decided to implement the reform only partially was their desire to maintain a pleasant atmosphere among their teaching staff. The reform involves changing teachers' work habits and burdening them with a heavier workload; therefore, principals who attached great importance to retaining a positive atmosphere in their schools deemed it necessary to bridge between their schools' needs and the reform guidelines. This notion was mentioned by 32 study participants.

Due to teachers' difficulty to get used to the reform, John, a principal with 13 years of experience, decided to implement the reform flexibly:

I implement the reform in a flexible way so as to bridge between the reform's goals and my teachers' needs. I think a school principal has to preserve the existing state of affairs, and develop and lead the staff based on both teachers' individual and collective abilities, otherwise it is impossible to get the staff to step onto unfamiliar ground. I believe it's better to act professionally in order to get teachers to adjust to new practices, so I implement only the changes that suit our capabilities.

John creatively introduced some of the reform's guidelines into his school, implementing them selectively. The only changes he made were those that were in line with his school's capacities, and it may be interesting and worth noting that this is precisely what he calls "acting professionally." In this way he maintained a good atmosphere among the staff, gradually acclimatizing the teachers to the new arrangements.

Steve, a principal with three years of experience, believes that the reform should be "user-friendly." Although no one has given him formal permission to adapt the reform to teachers' needs, he developed a bridging strategy while making sure he did not excessively deviate from the reform guidelines:

I coined a term – "user-friendly reform" – because I want my teachers to enter the reform without harming the goals for which it was created. Still, we must not forget that I have staff members here whose needs, troubles and pains must be understood. I try to fit the reform to each teacher individually, helping him or her adjust to it. No one pointed out to me that it's possible and effective to be attentive to teachers' needs; I developed my own balancing strategy without deviating too much from the "red lines". It turns out to be better if you allow greater flexibility.

According to Aaron, a Principal with six years of experience, being overly strict about the reform guidelines is simply cruel:

A principal who is not flexible with his staff is a downright fool, and should know that he'll end up in a pretty bad state. A principal must be sensitive to his teachers' needs and use his common sense while behaving humanely; for me, being considerate of teachers' needs means taking the time to think how they feel. Being inconsiderate means sticking to petty details, and that just doesn't work. It doesn't take much for a principal to fail. If he wants to be successful he needs to be a Superman, and that makes all the difference. It takes knowing how to balance reform guidelines with teachers' needs and desires. Lots of balancing is required, plenty of emotional intelligence, and openness towards the staff.

Aaron believed that flexibility was the key to success: the principal must take into consideration the teachers' needs as well as his own common sense, behaving "humanely" rather than strictly by following the reform's instructions. Similarly, Bella, a Principal with 21 years of experience, believed that while implementing the reform, what is good for the teachers is good for the school:

Sometimes I say no because that's what the reform regulations dictate, and then later on I exercise my own judgment and say yes, telling myself that this [deviation from the regulations] is for the school's benefit. To me it is very important that the teachers feel supported and able to do their very best in this reform climate. So I do my best, but sometimes that's not enough, because it is not all up to me.

Bella described hesitation, but used her own judgment, a consideration that will be presented below, articulating a clear position: from her perspective, the teachers' sense of receiving support is important, and therefore deviating from the reform guidelines is justified.

Muhammad, a Principal with nine years of experience, allowed teachers to leave work early, as a transitional stage on the way to implementing the new working conditions. From his perspective, this flexibility prevented unnecessary resistance:

When we entered the reform, I dismissed teachers earlier than the time stipulated by the new rules because I wanted to implement the reform gradually. This may be considered improper in terms of formal reform guidelines, but I think that's what helped the staff to digest the reform successfully, and prevented unnecessary resistance.

Muhammad was aware that his policy "may be considered improper in terms of formal reform guidelines." However, in his eyes the effectiveness of this decision justified it. Similarly, Michael, a principal with 13 years of experience, related:

Deep systemic change happens through people, so as a principal I am obligated to maintain an ongoing and supportive dialogue with each and every individual on my staff. In order to fully implement the reform, I allow teachers some freedom within the reform guidelines so that they get acquainted with the new setting in which they're about to work. You do not want your teachers to feel they are "pinned down" but rather that they have some leeway. Allowing my teachers room to maneuver means giving them a chance to learn the reform demands. If you implement the reform rigidly you will eventually break your staff.

According to Michael, since "deep systemic change happens through people," the principal has to "maintain an ongoing and supportive dialogue." In his view, this dialogue means allowing the teachers a certain degree of freedom of movement within the reform guidelines, enabling them to adapt to the reform gradually.

Eva, a principal with six years of experience, was not particularly strict with her teachers either, as she wanted to make things easier for them. She explained her preference to trust them rather than force them:

Sometimes mentioning the reform creates difficulty and deters the staff. My job is to remind them that we already work according to reform guidelines. I eased the way in for teachers by not being too strict about their hours. I trusted them to give the hours they're obliged to give instead of

forcing them to do so. If they worked fewer hours one week, they made up for it the next. I allowed the teachers to determine when and how, I was very easygoing.

Solomon, a Principal with 14 years of experience, accused the reform of creating situations in which he felt he had no choice but to manipulating the system. He adjusted the reform to the school's reality, as explained above, matching it to teachers' abilities:

I do my best to "slice" the reform as I see fit, matching its guidelines to each teacher's personality. It's not easy, because the reform has created situations in which I sometimes have to manipulate or "trick the system".

In short, principals' wish to facilitate teachers' adaptation to the reform guidelines was one of the reasons for their development of creative bridging and adjustment strategies. As they feel committed to their teaching staffs, they balance between external demands and local capabilities. It should be noted that the various considerations of school principals resulting in their decisions to follow the national reform's guidelines only partially are interrelated. Thus, principals who considered caring for their teaching staffs also considered demonstrating administrative flexibility, using their discretion to adjust the reform to school reality.

Using discretion

One more reason why principals decided to implement the reform only partially was their wish not only to follow instructions but also to use their own judgment. In their view, principals are not supposed to merely comply with superiors' instructions, but also to be allowed to act in accordance with their own educational experience and discretion. This notion was mentioned by 17 study participants.

The principals interviewed for this study felt that the education reform reduced their autonomy as well as the flexibility they could exercise in their schools. Pamela, for example, a principal with seven years of experience, said that because of the reform, she could no longer do what she wanted: "While in the past I had almost full autonomy, today I am subject to close monitoring and must hand in reports on everything I do. Supervision has become much more massive." Also Linda, a Principal with nine years of experience, has noticed the difference between the reform period and the preceding one: "In the past, I didn't feel – as I do now – that others decide for me about things that are within my area of responsibility. No one interfered in my autonomy to such an extent." Sharon, a Principal with 21 years of experience, expressed her feeling about working within the reform period by using the image of a puppet on a string: "I'm like a marionette – a puppet on a string; someone decides, moves and determines what must be done, and I have to perform. There are lots of things that I should decide on, but now someone else decides for me on things that are really my responsibility, things that are in my area of expertise."

Principals who did not want to merely follow instructions implemented the reform only partially, according to their own educational understanding. Nancy, for example, a Principal with 12 years of experience, did not comply with some reform guidelines with which she disagreed:

Let's say I want to reward a certain teacher. She helps everyone like mad, works way beyond her hours, and puts a lot into her teaching. And then it turns out that her sister has a celebration for her newborn baby at two o'clock. It's only reasonable to reward her and let her go, but according to the reform guidelines I am not allowed to dismiss her. This "forbidden reward" is just unreasonable. So here and there I use my discretion.

Nancy allowed the dedicated teacher to leave work early for one time, although it was not compatible with the provisions of the reform, because in cases that she considered "unreasonable" she took teachers' needs into account and used her own discretion.

Similarly, Megan, a Principal with six years of experience, made sure that teachers are not tired during their professional development courses:

Teachers get to their professional development courses exhausted, so I am flexible and dismiss them earlier, contrary to the written guidelines. In some schools the principal does everything according to the reform guidelines and really exhausts the teachers. Teachers' participation in professional development courses is an important school objective for the students' benefit. Yet my teachers' convenience is no less important and therefore I'm willing to take the responsibility.

Megan allowed the teachers to leave work early not only on the exceptional occasion of a family event; since she believed that teachers' convenience is important, she ignored the provisions of the reform, preferring to act according to her discretion, considering teachers' needs as well.

While Nancy and Megan shortened teachers' hours at the school, Jennifer, a Principal with eight years of experience, extended it by holding teachers' meetings at times when teachers are not required to be in the school at all. However, like Nancy and Megan, Jennifer also deviated from the reform guidelines in a different way, based on her educational discretion:

I see schools as hamstrung by the reform's detailed rules and bureaucracy, therefore I believe that a determined school principal can make decisions about a wide range of matters. In my school I've decided to hold meetings beyond attendance hours. I know this is contrary to the provisions of the reform, but since I'm the principal, I'm the one to decide.

More broadly, Benjamin, a Principal with 13 years of experience, asserted that the principal's autonomy must be retained:

There is an enormous gap between my autonomy as a principal and my actual role according to the reform guidelines. Leaving me unable to exercise my leadership seems wrong to me. If I see that a certain teacher can't manage her class and I put another teacher in the adjacent classroom, I may have exceeded the number of hours or of students; but Good God, let the principal use his or her discretion. That's the only way to make this reform work.

From Benjamin's perspective, without preserving the principal's autonomy the reform will not be integrated effectively. Believing that affecting the ability of the principal to exercise discretion was a mistake, he sometimes worked according to his own judgment, even if it was not compatible with reform regulations.

Also William, a Principal with eight years of experience, claimed that his autonomy within the reform rules is excessively limited:

In this reform I often lack the necessary autonomy and authority to effectively lead my school. However, as an experienced principal I have the ability to bargain for greater authority by using unconventional means. When needed, I also know how to deviate from the guidelines of the reform, employing my educational discretion and acting in accordance with my own values.

William strives for greater autonomy and authority, and knows how to attain them. His actions are sometimes pursuant to his values.

In sum, school principals believe they were appointed to their positions due to their possession of some degree of educational understanding. Thus, when they face the reform's dictates, they assume that their own judgment should triumph at least in some cases. As noted above, the three considerations presented in this chapter are interconnected. Therefore the decisions of principals who used their own discretion during reform implementation also reflected their perceived need to adjust the reform to school reality while caring for teachers.

Discussion and implications

The current study's qualitative analysis of principals' interviews has indicated three major considerations regarding their decisions to implement a national reform's guidelines only partially: adjusting to school reality; caring for teachers; and using discretion. Although the

three considerations are distinct, they are interrelated in the context of implementing an education reform. When principals decided on partial rather than full implementation, they often did this as a result of their attempts to fit the reform program into their school's reality, so as to maintain a pleasant atmosphere among the teaching staff, and using their own judgment interchangeably. However, it is important to understand the unique focus of each of these considerations.

The first consideration of school principals, that of adjusting the reform guidelines to school reality, involved taking into account the school's characteristics and circumstances, such as working conditions, schedule constraints and educational needs. Many principals believed that they were in the best position to know exactly how to implement the reform within their local context. While some reform models aim to increase school autonomy and devolve decision making to include local considerations (Mayer and LeChasseur, 2013), the principals in this study took the authority to decide how to implement the reform without formal permission to do so.

The second consideration of principals, that of caring for teachers, involved taking teachers' attitudes and abilities into account, working to obtain their support for the reform. Policymakers assume that after launching the reform, teachers will become familiar with it and adjust their practices to its guidelines while partaking in the necessary additional professional training; however, this cannot be taken for granted (Loeb *et al.*, 2008; Terhart, 2013). Teachers' resistance to imposed reform may even be formally organized, represented by teachers' unions (Pogodzinski *et al.*, 2015; Young, 2011), but it may also be reflected in their actual practices. When teachers enact policy reforms in daily school and classroom situations, they actively redefine the reform (Imants *et al.*, 2013). Over time, teachers' work under the reform guidelines often leads to a positive change in their attitudes (Donaldson, 2012; Fredriksson, 2009); nevertheless, their initial reactions to the reform policy can make or break its chances of implementation (Ma *et al.*, 2009). Principals are expected to gain their teachers' support for the reform, thus they deploy persuasion tactics, working to frame policy in ways that would appeal to teachers' interest, values, goals and norms (Spillane and Kenney, 2012). However, our findings show that while communicating with teachers in a variety of ways and on various occasions about this issue in order to reduce resistance and gain support for it, principals also opted to implement the reform incompletely out of consideration for teachers' attitudes and needs.

These two considerations reflect the mediating work of the school principal, who has to reconcile inside needs and capacities with outside demands and expectations. As aforementioned, a school principal may be seen as one who stands at the school doorstep, between the extra- and intra-school worlds (Kelchtermans *et al.*, 2011), determining whether the school will work by bridging or alternatively by buffering external influences (Kohansal, 2015; Maxcy *et al.*, 2010; Paredes Scribner, 2013). Particularly, the question of bridging vs buffering becomes more crucial during periods of education reform (Rutledge *et al.*, 2010). This study found that when deciding about bridging and buffering, principals usually consider how to balance between external demands on the one hand, and school characteristics and teachers' attitudes and needs on the other.

The third consideration, that of using discretion, reflects principals' desire to use their own judgment. This consideration highlights an additional perspective: principals not only mediate between external authorities and their school community but also bring their own practical wisdom into the job. Thus there are three elements shaping the principal as a mediating agent: the outside (out of school), the inside (in school), and the personal wisdom of practice (Kelchtermans *et al.*, 2011). A closer look at the principals' discretion issue reveals that it generally involves practical considerations, whereas educational values were rarely mentioned in this context. Apparently the complexity of implementing intricate reform policy leads principals to take into account mainly pragmatic aspects, while the moral and ethical aspects are not explicitly mentioned.

The principals' considerations described in this study may also be perceived through the concept of sense-making, which is used to denote an ongoing process through which people work to understand issues or events that are novel, ambiguous, confusing, or in some other way violate their expectations (Maitlis and Christianson, 2014). Sense-making is a process that applies to both individuals and groups who are faced with new information that is inconsistent with their prior beliefs. Since a national education reform involves comprehensive changes, uncertainty, a lack of information, alteration of previous working habits and new arrangements (Kalenze, 2014), principals' interaction with it may be conceived in terms of sense-making, as they grope with initial ambiguity, confusion and misunderstandings (Allen and Penuel, 2015; Matsummura and Wang, 2014). Through their sense-making process, principals in this study considered how they should adapt the reform to their particular school contexts. They described their role as "leadership experts" that creatively implement external-national demands in accordance with their own educational discretion, while caring for the staff and adjusting the reform guidelines to school reality. This is in line with prior studies arguing that school principals adapt state policies to their own beliefs and understandings, making key decisions as to which of these they will bring in to their schools, which they will emphasize to their staffs, and which they will filter out (Coburn, 2005; Spillane *et al.*, 2002).

Facing reform demands, principals make sense of their role in managing their relationships with their environment (Honig, 2012). Our study suggests that principals re-construct their role identity while developing creative strategies as a means of interpreting both internal and external contexts. Particularly, this study's findings revealed that principals aspired to serve as local policymakers, wishing to play an active role in negotiating federal regulations and local capacities while enacting reform demands through their own "organizational creativity." Although unofficially, these principals became active local policymakers by creatively adapting the external demands to suit their schools' needs and abilities. In this regard, Brewer and Carpenter (2012) suggest the term "savvy participants"; according to Weick's (2009) terminology, these are principals who "enact" their policy roles.

Policy enactment, as illustrated in this study, is the process by which school leaders practically interpret and re-contextualize policy mandates, thus perceiving the principal's role as that of creatively bridging the gap between theoretical policy and its actual practice (Fullan, 2014). According to Ball *et al.* (2012), policy enactment conveys "the creative processes of interpretation, that is, the recontextualization – through reading, writing, and talking – of the abstractions of policy ideas into contextualized practices" (p. 586). This highlights school leaders' active role in creatively shaping a particular policy into a specific set of circumstances, rather than merely perceiving their role as placed somewhere on the buffering-bridging continuum, which has been the common approach of most policy analyses.

As mentioned above, principals basically adhere to external guidelines; nevertheless, they often serve as mid-level policymakers who leave their "fingerprints" on policies received from the authorities (Flessa, 2012; Sargent, 2011; Youngs *et al.*, 2011). In this study, the reform was based on a top-down authority relationship, and principals were required to follow detailed instructions. There was no room for tailored implementation or creative interpretations. Yet, principals implemented the reform incompletely and in some cases acted in a way that was contrary to the reform guidelines. More specifically, as discussed in the research context section, the "New Horizon" reform encompasses many aspects of school-life, some focusing on structural-organizational aspects (e.g. a computerized time clock on which teachers must register their swipe cards) and others on more pedagogical aspects (e.g. individual teaching hours, which did not exist in teachers' schedules prior to the New Horizon reform). Thus, principals perceived themselves as bound to adhere to the

technical-structural elements of the reform, while choosing to what extent to adapt the reform's pedagogical elements. What is clearly illustrated by the present case, as Hall and Hord (2015) point out, is that various "innovation configurations" were being implemented differently as principals used their discretion to adjust the reform elements to school reality while caring for teachers' needs and capacities.

The principals in this study, then, used creative approaches while serving as local policymakers. However, we did not come across principals who took on a more active role, such as that of boundary spanning, which would mean linking their school's internal networks with external sources of information (Ambrose *et al.*, 2014). A principal employing this proactive approach would initiate direct contact with other schools as well as with the surrounding community, developing external relationships in order to accomplish the school's objectives (Williams, 2011). As a boundary spanner, such a principal could cultivate partnerships and collaborations as a platform for entrepreneurship (Hsu *et al.*, 2007), thus generating their school's cultural wealth particularly at times of external policy demands (Elmore, 2006; Wu, 2011).

Providing prospective principals with leadership education programs of relevant theoretical contents in order to develop an upgraded understanding of their role as mediating agents between the inner and outer spheres of school-life is crucial for their professional identities. It could also enhance their understanding of what makes mediating agents act effectively, as well as how they can engage others for the purpose of achieving school goals through a shared process. In addition, one of the most effective ways to learn about the mediating agent's role is to listen to current leaders speak of their own mediating activities. Through various mediating examples, current and future school principals can reflect on what those leaders considered, and actually did, during reform implementation, evaluating these mediating practices in light of their specific school contexts.

School district central offices have an important role to play in helping schools make sense of external demands. They should facilitate both the top-down and the bottom-up policy response by simplifying external messages, helping schools integrate external demands with internal goals and strategies, and by so doing, help school actors make sense of policies, facilitating a match with local conditions and resources. Policymakers need to invest time in communicating and working with school leaders and teachers in order to attain a deeper understanding of reform demands. More specifically, policymakers and school principals should build and sustain bridges of communication, support, and knowledge between their respective worlds as they enact education reforms (Daly and Finnigan, 2011; Honig, 2012). Thus, effectively responding to state and federal policies at the local level requires a learning partnership among and between the district and school leaders.

Compared with prior studies, this study provides new data on principals' considerations while implementing an education reform in their particular school context; however, further research is required since the findings were collected in a particular context, so that their cross-cultural validity was not proven. Replicating this study elsewhere in various socio-cultural contexts will enable generalization of the findings to broader populations, possibly substantiating their international validity. Additional longitudinal studies, including repeated interviews with the same school principals in order to explore how their considerations and mediation strategies evolved and unfolded throughout the reform implementation, would also be useful. In addition, since this research focused on principals' verbal interpretations of their leadership role within the context of a national reform program, further research could complement principals' verbally expressed perceptions with more objective measures such as direct observations (recorded on video and then reflected upon), to evaluate their considerations and mediating strategies while implementing a national education reform in their particular school settings. We used

maximal differentiation sampling (Creswell, 2014) to capture a wide range of perspectives and gain greater insight into principals' considerations; however, it is important to explore the interactions between these considerations and factors, such as gender, seniority, and districts. Finally, further study could explore whether and to what extent the reform's intended outcomes have been affected by principals' considerations.

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