

**A SYSTEMATIC REVIEW OF PRINCIPALS LEADERSHIP  
IDENTITY FROM 1993 TO 2019**

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## A SYSTEMATIC REVIEW OF PRINCIPALS LEADERSHIP IDENTITY FROM 1993 TO 2019

### **Abstract**

There is growing interest in the role that principals play as school leaders. Exploring how principals build their professional leadership identity is crucial to understanding their influence on school performance. A systematic review was conducted to examine how educational leaders build their professional identity. Our objectives were: i) to identify the factors that determine how educational leaders build their professional identity; ii) to identify shared traits of educational leadership identity; and iii) to describe the implications that the results obtained may have for research and professional practice. A literature search on WOS, SCOPUS and ERIC yielded a total of 38 articles published in international journals. Thematic analysis was conducted using the Nvivo software package. Emerging topics include: leadership identity of school principals as the key to educational success; influence of politics and context on the construction of principals' professional identity; race and gender-based barriers to the development of leadership identity; and the influence of experience, training, and transition on the construction of a professional leadership identity.

**Key words:** principal, identity, leadership, systematic review.

## Introduction

Research in the field of education has demonstrated that school leadership is crucial to school and academic improvement (Day, Sammons, Leithwood, Hopkins, Gu, Brown and Ahtaridou, 2011; Hallinger and Heck, 2010; Leithwood and Jantzi, 2008; Muijs and Harris, 2006). Based on this finding, leadership in schools has become a priority in education policies worldwide (CEPPE; Hartley, 2009; OECD, 2013; Pont, Nusche, and Moorman, 2008; UNESCO-IIEP- IWGE, 2012).

International studies and reports identify differences in achievements based on the context and environment. This effect demonstrates that school leadership is not approached from a standard perspective, and that leadership is exercised differently by school leaders. Even in similar contexts, different achievements are obtained, based on the way in which leadership is approached. This phenomenon suggests that there are other personal, cultural, and identity factors at stake in the exercise of school leadership.

In this regard, a number of studies have been conducted to better understand the concept of "professional identity", including its construction and development and the factors that either hinder or help the transition towards school leadership (Akkerman and Meijer, 2011; Dubar, 2002). The results of these studies may shed light on how school leaders build a professional identity that drives them to exercise school leadership.

A third strand has emerged on the identification of personal qualities and professional competencies generic to effective school leaders of the International Successful School Principalship Project (ISSPP) coordinated by Christopher Day. This project has encouraged a series of research studies focused on the building of professional leadership identity in successful school leaders (Aas and Vavick, 2015; Crow, Day and Møller, 2017; Ritacco and Bolívar, 2018; Robertson, 2017; Sinha and Hanuscin, 2017).

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3 This emerging topic encouraged us to conduct a systematic literature review (SLR) on  
4 professional leadership identity in school leaders at international level. Our objective was  
5 to identify relevant findings that answer the following research questions:  
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- 11 • What are the characteristics of studies on leadership identity in school leaders?
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- 13 • What are the primary factors that determine the building of a leadership identity
- 14 in school leaders?
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- 16 • What implications may the findings have for professional practice?
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21 This review adopted a systematic approach to include international literature on  
22 professional identity and leadership in principals (Hallinger, 2013). The process of  
23 searching and selecting thematically relevant studies resulted in the review of 38 articles  
24 indexed in three databases (WOS, Scopus, and ERIC), between 1993 and 2019. By  
25 outlining the **international perspective**, this study provides relevant points of interest and  
26 future lines of research that have emerged on the basis of our included studies.  
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37 To facilitate the understanding of the findings, we have structured the results into two  
38 blocks with their corresponding subsections: general description of the studies and  
39 emerging topics. Subsequently, a discussion was advanced using the findings from  
40 relevant research on this subject. Finally, we end with some concluding observations.  
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## Theoretical framework

Numerous studies have emphasized the association between school leadership and school improvement (Hallinger and Heck, 2010; Thoonen, Slegers, Oort and Peetsma, 2012; Muijs and Harris, 2006; Bush, 2009). Several international reports (OECD, 2013, UNESCO-IIEP- IWGE, 2012) support the idea that educational quality stems from transformational processes where school leaders are assigned a major role. The evidence demonstrates that scant attention is paid to professional leadership in some countries –as documented by Rhodes and Brundrett (2007). Based on current evidence, on-going educational reforms are focused on the **building** of professional leadership identity, which is considered to be a determinant of successful teaching practices (Leithwood and Jantzi, 2008; Soini, Pietarinen and Pyhalto, 2016; Scribner and Bradley-Levine, 2010; Brezicha, Bergmark and Mitra, 2015).

With regard to school leadership, school leaders have been observed to play a critical role due to their organizational (Schleicher, 2012) and political involvement (Crow, Day and Møller, 2016). High expectations have emerged regarding the role of school principals, who are considered key to school improvement (Cowie and Crawford, 2008). Evidence has been provided of the ability of principals to gain the commitment of school members to a shared vision for their school (Urick and Bowers, 2014). This idea is supported by Botha (2006), who identified some of the abilities required for the exercise of **school** leadership, namely: "to convince, inspire, bind and direct followers to realize common ideals"(p. 342).

This is why being a principal and exercising school leadership is a complex task that involves the development of professional pedagogy skills. Consequently, these competences are influenced by factors of both an external and internal origin that make

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3 management work even more difficult. It is also relevant to refer to “cross-cultural  
4 leadership” (Dickson et al. 2012) because the expectations of the management role vary  
5 according to the existing school culture in each territory. Each context and culture  
6 incorporates important nuances in the conceptualization of school management. These,  
7 these are named differently according to the country (i.e. head teacher, headmaster,  
8 principal), emphasizing roles of "head", "responsible", "first authority", "chief" or  
9 "leader."

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11 In addition, it is key to mention the evolution, in the last decade, of the term "Educational  
12 Administration" towards the concept of "Educational Management, Administration and  
13 Leadership" in various countries, such as the United Kingdom and some parts of Europe.  
14 This evolution has provided a greater vision of leadership in the school organization,  
15 rebuilding the professional identity of the school principal (Bush, 2019).

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17 Some barriers to the development of a professional leadership identity include the burden  
18 of paperwork that is imposed on principals, which diverts them from pursuing  
19 pedagogical goals (Ritacco and Bolivar, 2018; OECD, 2013; Bush, 2018). This limitation  
20 is closely related to the growing culture of accountability, which is gaining ground in  
21 European education policies (Connolly, Milton, Davies and Barrance, 2018). Other  
22 **influential** factors include gender (Rusch and Marshall, 2006; Coleman, 2000; Pont et al.,  
23 2008; Crow, Day and Møller, 2016), experience (Mpungose, 2010; Cardno and Youngs,  
24 2013) or the lack of support and commitment of school members (Galdames, Montecinos,  
25 Campos, Ahumada and Leiva, 2018; Rhodes, Brundrett and Nevill, 2009).

26  
27 School performance improves when leadership is successfully exercised by the principal  
28 (Cowie and Crawford, 2008). Yet, as Thomson (2009) observed, school leadership is  
29 more than simply a way to do things, it is also a way to be and understand the world" (p.  
30 1). In this regard, investigations into leadership require the collection of data on  
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3 principals, understanding what they think, feel, and believe beyond their actions, which  
4 involves studying leadership identity (Sugrue, 2015). In brief, there are major reasons  
5 for deepening our understanding of the self in school leadership (Robertson, 2017). These  
6 studies resulted in the emergence of the term *leadership identity* (Sinha and Hanuscin,  
7 2017; Aas and Vavick, 2015).

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15 The “self” is ambiguous and is composed of a constant flow of multiple identities (Møller,  
16 2012; Scribner and Crow, 2012). According to Ricoeur (1992), "selfhood" can be  
17 understood as a narration containing all the components of story telling. It is difficult to  
18 conceptualize 'identity', as it is not an objective reality and is developed based on *self-*  
19 *perception*, which is in turn based on values, impulses, beliefs, traits, and experiences  
20 with others (Ibarra, 1999; Slay and Smith, 2011).

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The scientific literature includes different types of identity. For instance, Burke & Stets  
(2009) categorize this into social identity, personal identity, and role. Other approaches  
criticize this static conception, focusing on the interaction between these dimensions  
(Thoits and Virshup, 1997). Identity represents a concept that is of a changing and  
unstable nature. Therefore, it is in constant negotiation, since the contexts that involve the  
individual are varied.

In the present article our focus will primarily be centred on the issue of professional  
identity. In relation to this concept, Crow, Day and Møller (2017) associate this with  
professional and personal aspects. According to Dubar (2000), identity can be defined as  
the result of personal interactions along with the social, cultural, and organizational  
context. This means that identity cannot be separated from personal relations and the  
environment, which are always subject to the influence of historical and cultural factors  
(Baumeister, 1986; Trede, Macklin and Bridges, 2012; Wenger, 1998). In this sense, "the  
development of identity involves a dual process: identity for oneself and identity for

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3 others" (Dubar, 2000; Ricoeur, 1996), and it takes a long time to construct and develop  
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5 an identity. Therefore, professional identity is not static, but is instead constantly  
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7 changing and transient (Day, Elliot, and Kington, 2005; Reay and Ball, 2000).  
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10 Professional identity is in a continual state of development. Individuals are constantly  
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12 reflecting on the changes that occur around them, and these reflections drive them to  
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14 **develop** an identity based on the way they interpret their *autobiographic story* (Ricoeur,  
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16 1996). In this regard, the professional identity of principals is in constant evolution as  
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18 they adapt to the different barriers, challenges, and experiences they face. These barriers  
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20 may include political, social and cultural changes, their race, gender or their personal  
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22 experiences. But professional identity can also be consciously changed, as stated by  
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24 Robertson (2017) "... as a result of learning processes and reflections about oneself."  
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26 Thus, all subjects have the ability to improve their personal and professional  
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28 competence". Guskey and Yoon (2009) observed that professional development requires  
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30 the successful implementation of new practices in the classroom. Successful practice —  
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32 which is made possible thanks to transient identity — is where the lessons learned are  
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34 integrated into professional identity, and where individuals learn to adopt positive  
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36 thinking and are able to control emotions.  
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## 46 **Methods**

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49 This study is a systematic literature review (Petticrew and Roberts, 2006; Gough, 2007;  
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51 Hallinger, 2013, 2014). Our primary purpose is to construct a qualitative synthesis of  
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53 research hotspots in the field of leadership identity in school principals. To this end, we  
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55 conducted an exploratory review of the literature to identify the objectives, context, and  
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57 design of studies within this field (Hallinger and Bryant, 2013). We also explored  
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emerging topics and avenues for future research and practice (De Vries, Bekkers and Tummers 2015; Voorberg, Bekkers and Tummers 2015).

### ***Inclusion and Exclusion Criteria***

The key criteria for identifying the selected studies were based on those used in other systematic reviews (i.e. Castillo and Hallinger, 2017), including: thematic adequacy, time period, and type of source. A set of inclusion and exclusion criteria were used in our literature search on Web of Science (WOS), SCOPUS and ERIC as follows:

*Table 1.* Inclusion and Exclusion Criteria

<b>Inclusion criteria</b>
Studies published in the WOS, SCOPUS and ERIC databases resulting from the pre-established search equations.
Studies that were published in either a review or article format
Relevant topic that may answer our research questions and goals
School-centred studies
Studies addressing the role of school principals.
Scientific studies on the following areas and research domains: <ul style="list-style-type: none"> <li>- In SCOPUS: studies labelled within the research domain "Social Sciences".</li> <li>- In WOS: studies labelled in the field of research "Education, Educational Research"</li> </ul>
<b>Exclusion criteria</b>
Not meeting inclusion criteria

### ***Search strategy***

A literature search was conducted using WOS, SCOPUS and ERIC to identify articles relevant to our SLR. In order to provide rigour to our search process, we proceeded to establish keywords extracted from the ERIC thesaurus (Hertzberg and Rudner, 1999).

The keywords used in our search equation were: professional identity AND leadership AND principal OR head teacher<sup>1</sup>. Table 2 provides data on our search strategy

*Table 2.* Strategy used in our literature search

<b>Data base searched</b>	<b>Key words used</b>	<b>Articles identified after the application of selection criteria</b>	<b>Articles included</b>
Web of Science (WOS)	TS= (“professional identity”) AND (principal OR head teacher) AND (leadership))	46	16
ERIC	(“Professional identity”) AND (principal OR head teacher) AND (leadership)	50	13
Scopus	TITLE-ABS-KEY("professional identity") AND TITLE-ABSKEY(Principal OR head teacher) AND TITLE-ABS-KEY(leadership)	27	9
<b>Total</b>		<b>123</b>	<b>38</b>

Below are the stages of the literature search of our systematic review.

<sup>1</sup> This key word was added because it is used in various countries to refer to the principal

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6 *Figure 1.* Flow chart of stages of literature search  
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10 ***Data extraction and quality assessment***  
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12 The process of including the studies in our SLR was carried out through peer review  
13 (Sarhou 2016). We proceeded to read the articles returned by our search to identify only  
14 those that were relevant to our research questions and goals. Of the 42 articles returned,  
15 we selected 38. In this phase, the reason for exclusion of these studies was thematic  
16 inadequacy in relation to our issue of study.  
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24 Thematic analysis of the selected studies was carried out by the qualitative analysis  
25 software Nvivo, to identify the "topical focus" of the included literature. The emerging  
26 thematic categories were shared and agreed upon by three researchers, in order to ensure  
27 the coherence of this codification.  
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37 **Results**  
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40 This section begins with a synthesis of the research purposes and the contexts and studies  
41 included in our systematic review. An overview of the temporal evolution of scientific  
42 production in the selected databases is also provided. Subsequently, we present an  
43 analysis of the "emerging topics" found in the review. A general overview of the 38  
44 articles included revealed the emerging hotspots of research on principal professional  
45 identity and school leadership.  
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57 ***General description of the studies***  
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### *Objectives and research questions*

The studies included had a variety of objectives, which can be synthesized into two core objectives:

Firstly, the general objective of many studies was to understand the process of developing, negotiating and construction of professional leadership identity (Boris-Schacter and Merrifield, 2000; Connolly, Milton, Davies and Barrance, 2018; Crow, Day and Møller, 2016; Miller, Potter, Bennett, Carter, Hylton-Fraser, WilliamsonTeape and Nelson-Mayne, 2015; Johnson, 2017; Rayner, 2018; Ritacco and Bolivar, 2018; Robertson, 2017; Spies and Heystek, 2015). The prevailing theme of these articles was to address gender and race-based barriers to the development of leadership identity in school leaders (Amstrong and Mitchell, 2017; Arar and Shapira, 2016; Hernández and Murakami, 2016; Jones, 2017; Lya, Faraj and Wubbels, 2002; Mendez-Morse, Murakami, Byrne-Jiménez and Hernández, 2015; Murakami and Tornsen, 2017; Nickens and Washington, 2017; Watts, 1998). Other authors such as Bredeson (1993), Mpungose (2010), Notman (2017), Stamopoulos (2012) or St-Pierre (2005), also examined the factors that determine the development of leadership identity and practice.

Secondly, a shared objective was to evaluate the ability of school leaders to influence the school community (Carpenter, Bukoski, Berry and Mitchell, 2017; Mifsud, 2015; Payne and Smith, 2018; Rigby, 2015; Toure and Dorsey, 2018; Montecinos, 2018). These studies were aimed at examining the influence that school principals may exert on pupils and teachers and how the way in which they exercise leadership may support or prevent discriminatory actions and perpetuate stereotypes in school. **For them, all of these studies pointed to the need for a leadership identity.**

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3 Other studies focused on the issues of professional development and training to achieve  
4 a professional leadership identity (Maguire & Braun, 2019; Greer, Searby and Thoma,  
5 2015; Rhodes, Brundrett and Nevill, 2009). Furthermore, studies such as Montecinos,  
6 Bush and Aravena (2018) examined how professional experiences influenced the  
7 development of professional identity. Literature included in this review (Browne-  
8 Ferrigno, 2003; Connolly, Milton, Davies and Barrance, 2018; Rhodes & Brundrett,  
9 2006; Simon, Dole & Farragher, 2019; Wallace, 1996). analyzed key factors in the  
10 transition to principalship.  
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22 Notably, all studies highlighted the need to comprehend the professional identity of  
23 school leaders in order to understand their leadership practices.  
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### 28 *Context and study designs*

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31 In relation to the geographical distribution of studies, twelve studies had been conducted  
32 in the USA and nine in the UK. This means that studies in this field are largely conducted  
33 in Anglo-saxon countries. Other countries included: Canada, Spain, Sweden, Israel,  
34 Malta, South Africa, Australia, Jamaica, Chile and Lebanon.  
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41 Study participants were mainly school principals, whilst other stakeholders such as  
42 teachers, families, pupils, and others participated in some studies.  
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47 Most studies were qualitative, of which only three employed a mixed design (Lya, Faraj  
48 and Wubbels, 2002; Montecinos, Bush and Aravena, 2018; Rhodes, Brundrett and Nevill,  
49 2009), and only one study was quantitative (Greer, Searby and Thoma, 2015). Ten studies  
50 were case studies, of which eighteen (Arar and Shapira, 2016; Bahous, Busher and  
51 Nabhani, 2016; Boris-Schacter and Merrifield, 2000; Bredeson, 1993; Browne-Ferrigno,  
52 2003; Carpenter, Bukoski, Berry and Mitchell, 2017; Maguire and Braun, 2019; Mendez-  
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Morse, Murakami, Byrne-Jiménez and Hernández, 2015; Mifsud, 2015; Miller et al. 2015; Notman, 2017; Rayner, 2018; Rhodes and Brundrett, 2006; Rigby, 2015; Ritacco and Bolivar, 2018; Riveros, Verret and Wei, 2016; Simon, Dole and Farragher, 2019; St-Pierre, 2005; Toure and Dorsey, 2018; Wallace, 1996; Watts, 1998) were based on semi-structured interviews with school principals and other school members. In some studies, data collection was also based on participant observation (Rigby, 2015; Toure and Dorsey, 2018), focus groups (Nickens and Washington, 2017) or documentary analysis (Mifsud, 2015; Riveros, Verret and Wei, 2016). Four studies used the method based on "life stories" (Johnson, 2017; Mpungose, 2010; Spies and Heystek, 2015; Hernández and Murakami, 2016)

#### *Growth Trajectory of the Literature on leadership identity in principals*

We found that a total of 38 articles on professional leadership identity in leaders had accumulated in recent decades. Table 3 shows the growth trajectory of the included literature, which began with the publication of an article in 1993. From that date until 2015 there is no significant growth. After that year, the number of publications increases steadily, reaching its maximum in 2017. However, it must be noted that this data does not represent all the knowledge published on leadership identity in principals. Only articles published in journals indexed in the WOS, ERIC and Scopus databases were taken into consideration in this review.

*Table 3.* Growth Trajectory of the literature search

1993	Bredeson (1993)
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1996	Wallace (1996)

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5 1998 Watts (1998)  
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7 1999 -  
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9 2000 Boris-Schacter and Merrifield (2000)  
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13 2002 Lya, Faraj and Wubbels (2002)  
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15 2003 Browne-Ferrigno (2003).  
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19 2005 St-Pierre (2005)  
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21 2006 Rhodes and Brundrett (2006)  
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25 2008 -  
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27 2009 Rhodes, Brundrett and Nevill (2009)  
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29 2010 Mpungose (2010)  
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31 2011 -  
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33 2012 Stamopoulos (2012)  
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35 2013 -  
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37 2014 -  
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39 2015 Greer, Searby and Thoma (2015); Mendez-Morse, Murakami, Byrne-Jiménez and Hernández (2015);  
40 Mifsud (2015); Miller et al. (2015); Rigby (2015); Spies and Heystek (2015)  
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42 2016 Arar and Shapira (2016); Bahous, Busher and Nabhani (2016); Crow, Day and Møller (2016);  
43 Hernández and Murakami (2016); Riveros, Verret and Wei (2016)  
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45 2017 Amstrong and Mitchell (2017); Carpenter, Bukoski, Berry and Mitchell (2017); Johnson (2017);  
46 Jones (2017); Notman (2017); Murakami and Tornsen (2017); Nickens and Washington (2017);  
47 Notman (2017); Robertson (2017)  
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49 2018 Connolly, Milton, Davies and Barrance (2018); Montecinos, Bush & Aravena (2018); Montecinos,  
50 Bush and Aravena (2018); Payne and Smith (2018); Rayner (2018); Ritacco and Bolivar (2018);  
51 Toure and Dorsey (2018)  
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53 2019 Maguire and Braun (2019); Simon, Dole and Farragher (2019)  
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### *Emerging topics*

After identifying the purposes of the included studies, the research contexts, and the trends over time, we turn to an analysis of the "topical focus" found in this review. In **Annex 1** the central theoretical terms of the studies included in our review are shown in order to explain how the authors place their research focus on the professional identity of leaders. From this, we classify the articles into four central categories. The first category focused on the relationship between leadership identity in principals and school success. The second category evaluates the political-contextual influence on the construction of the principals' identity. **Influence** of race and gender in the development of leadership identity were grouped into the third category, whilst in the fourth category, the central themes were experience, training, and transition.

#### *Leadership identity of school principals as the key to school success*

**In this review, several studies examine how leaders conceptualize their leadership identity. The development of a leadership identity in school principals was identified in several studies as being crucial to educational success.** According to Ritacco and Bolivar, successful leadership largely depends on leadership identities (Ritacco and Bolivar, 2018). In a similar vein, Crow, Day and Møller (2016) found that the sense of identity of principals as educators with strong moral purposes is a critical antecedent and co-requisite of their capacity for effective practices". Mpungose (2010) describe professional identity as "the principals' source of influence".

Identity, as the researchers claim (Johnson; 2017; Robertson, 2017) is constructed not only in an individual way, but also in such a way that society plays a decisive role in this construction. This identity is subjective and social, implying a dual process: identity of oneself and identity of others. So "No one can build their identity independently of the identifications that others build about such identity" (Ritacco and Bolivar, 2018). A successful leadership identity consists of multiple components, is subjectively (re) built

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3 to adapt to the political and social context and results from interactions with others (Crow,  
4 Day and Møller, 2016; Mpungose, 2010; Rigby, 2015; Ritacco and Bolivar, 2018).  
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6 Leadership identity is also determined by personal beliefs, values, and feelings (Boris-  
7 Schacter & Merrifield, 2000; Crow, Day and Møller, 2016). Other authors such as St-  
8 Pierre (2005), Lya, Faraj and Wubbels (2002) or Mpungose (2010) identified influential  
9 factors in the development of leadership identity such as social dimension, and the  
10 perceptions held by colleagues, the internal dimension (values and beliefs), individual  
11 expectations about principalship, and professional experiences.  
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22 There is a consistent body of evidence to support the idea that leadership has a social  
23 dimension. In this regard, relationships with the community have an influence on their  
24 professional identity (Mpungose, 2010). How others perceive you plays a crucial role in  
25 identity. Yet, this aspect has rarely been addressed directly in the literature. In some  
26 studies, the perception of others was tackled briefly (Bahous, Busher and Nabhani, 2016;  
27 Johnson, 2017; Mifsud, 2015; Miller et al., 2015; Rayner, 2018). The feedback that  
28 principals receive when they interact with others (or when they visit other professional  
29 contexts) is also an important contributory factor in their professional development  
30 (Miller et al., 2015).  
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43 **Certain studies included focus on the role expected of school leaders.** A principal has to  
44 feel that he/she identifies with principalship duties and functions. When a principal has a  
45 weak leadership identity, others may not recognize their leadership, which could hinder  
46 school achievement. In contrast, when principals have a strong professional leadership  
47 identity and their leadership is widely recognized by the school staff, school performance  
48 improves (Ritacco and Bolivar, 2018). According to these authors, principals with a  
49 strong leadership identity create team spirit, gain staff commitment, and build a shared  
50 vision for the school.  
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3 Another key aspect examined in our studies was to consider how their practices contribute  
4 to school improvement. Notman (2017) aimed to gain knowledge regarding the  
5 professional identity factors that are present in the role of the school leader and how to  
6 use them to make a change throughout the school. These factors are both individual and  
7 social, involving other educational agents such as the family, teachers, or department  
8 heads. Thus, it is argued that, "the professional identity of each of the principals was  
9 proven by a different set of cultural circumstances, where both principals had to establish  
10 an identity of the "reliable leader" in the eyes of their new staff (Notman, 2017, p. 768).  
11 For this reason, the studies highlight the need for a leadership identity in principals,  
12 highlighting the importance of both the personal and professional dimensions, as well as  
13 the influence of the educational community on the construction of such identity.  
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30 a) *Influence of politics and context in construction of principals professional identity*

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33 The evidence has consistently shown that political and contextual factors influence  
34 leadership practices and are a source of concern among principals.  
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39 At the international level, a series of guidelines have been established on what is expected  
40 of principals. In this regard, providing school principals with the tools to exercise  
41 successful leadership is a common thread that runs through the different studies analysed  
42 (Carpenter, Bukoski, Berry and Mitchell, 2017; Connolly, Milton, Davies and Barrance,  
43 2018; Rayner, 2018; Riveros, Verret and Wei, 2016; Rhodes, Brundrett and Nevill, 2009).  
44 Rayner (2018) identified some barriers to the successful exercise of educational  
45 leadership, including accountability and meeting standards, which create an instable  
46 environment. According to Riveros, Verret and Wei (2016), standards can be useful for  
47 the evaluation and promotion of principals, but they are of no value for daily practice, as  
48 they are a restriction to the exercise of their agency. In this vein, Spies and Heystek (2015)  
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3 observed a tendency to approach the education system from a mercantilist viewpoint,  
4 where principals are overloaded with paperwork. These authors argue that the authorities  
5 conceive principals as professionals who must meet a series of objectives and  
6 requirements, being accountable for everything that frames their work and thus leaving  
7 less space for their leadership role, and more for management tasks. *“The principal is  
8 bound in this process by the education authorities' objectives, and is held responsible for  
9 ensuring that these goals are achieved in the core activities of the school”* (p.443)

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19 Connolly, Milton, Davies and Barrance (2018) concluded that the duties of principals  
20 should be reorientated towards aspects related to professional practice. This would help  
21 principals to exercise their agency and achieve professional development.  
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27 Mifsud (2015) and Maguire and Braun (2019) documented that educational leadership is  
28 challenged by a number of factors that make some school actors invisible, thereby giving  
29 principals "hidden" power.  
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35 When the educational context is ambiguous, principals find it difficult to adapt to their  
36 environment. For these reasons, building a strong, assertive leadership identity is crucial  
37 for improving performance in both teachers and students (Bahous, Busher and Nabhani,  
38 2016). Rayner (2018) documented that creating a supportive, collaborative climate within  
39 the school community is key to the adoption of transient identities that enable principals  
40 to exercise school leadership. This view is supported by Notman (2017), who emphasized  
41 that adopting an adaptive leadership style based on values, and building a strong  
42 professional identity are crucial to the development of a leadership identity.  
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54 Therefore, the school context is an important determinant (Johnson, 2017; Bredeson,  
55 1993), a notion that is supported by the evidence found in our review. Spies and Heystek  
56 (2015) concluded that principals respond in unique ways to the peculiarities of their  
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3 school and the climate of support they find. Mpungose (2010) identified two determinants  
4 in the development of leadership identity: an internal dimension and a social dimension.  
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6 The latter embraces other factors such as the professional culture of the school and  
7  
8 expectations about the role of the principal. These studies indicate that organizational  
9  
10 culture is key to successful leadership (Bahous, Busher and Nabhani, 2016).  
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15 Thus, the social and cultural context that surrounds the educational centre, the  
16  
17 characteristics of the educational team, and the ideals of the centre, are decisive in the  
18  
19 development of leadership that could result in improvement. In addition, the included  
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21 studies point to mercantilism, accountability and educational standards as relevant factors  
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23 — and in some cases duress — in building a strong professional identity in school  
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25 principals.  
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29 *b) Race- and gender-based barriers in the development of leadership identity*  
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33 Principals often find race and gender-based barriers to the exercise of leadership, with  
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35 most authors being concerned about the difficulties encountered by female principals  
36  
37 when exercising leadership. Indeed, interest in gender-based difficulties in leadership has  
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39 grown in recent years (Amstron and Mitchell, 2017; Jones, 2017; Murakami and  
40  
41 Tornsen, 2017; Nickens and Washington, 2017).  
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45 **In this section, studies consider race and gender as influential factors in leadership**  
46  
47 **professional identity. To this end, authors relate these factors to the way in which diverse**  
48  
49 **leaders conceptualize their own identities.** The literature shows that many female  
50  
51 principals have to renegotiate or rebuild their professional identity to adapt to a male-  
52  
53 dominated social and cultural environment (Amstron and Mitchell, 2017). When  
54  
55 leadership positions are primarily held by men, female principals may feel forced to  
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57 change their leadership practices, agency, and professional identity. Female principals  
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3 "may inhabit several contradictory identities revealing qualities, characteristics and  
4 leadership styles which diverge from socially prescribed gender-appropriate behaviours"  
5 (Jones, 2017). Thus, according to Jones (2017), the professional identity of female leaders  
6 may be socially pre-established beyond individual views.  
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13 **On the other hand, some studies focused on how diverse leaders conceptualize their own**  
14 **professional identities.** Murakami and Tornsen (2017) found that female principals often  
15 feel they are evaluated negatively even when they improve school performance.  
16 According to these authors, this phenomenon is related to "the way in which female  
17 principals are recruited, hired, and weighed when appraised". Further, these authors state  
18 that a gender-based bias persists in the way female principals are perceived in the school  
19 community, despite governmental efforts to create an egalitarian culture. These  
20 difficulties are the result of the power of normalization of the patriarchy, which has hidden  
21 administration and leadership policies aimed at marginalizing and excluding different  
22 identities to control and hinder certain educational practices.  
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37 In addition to these evidently gender-based barriers, cultural and racial barriers are also  
38 encountered. Gender and race-based discrimination has been addressed by numerous  
39 authors (Amstrong and Mitchell, 2017; Arar and Shapira, 2016; Hernández and  
40 Murakami, 2016; Mendez-Morse, Murakami, Byrne-Jiménez and Hernández, 2015;  
41 Nickens and Washington, 2017), which often judge from a "racial lens" (Amstrong and  
42 Mitchell, 2017).  
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51 Nickens and Washington (2017) investigated whether Afro-American principals can keep  
52 their leadership identity and maintain their position. The authors found evidence that  
53 Afro-American principals change their personality, manners or beliefs to pave their way  
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3 to principalship. These principals often feel socially and professionally isolated due to  
4  
5 gender and race-based barriers.  
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9 Finally, Payne and Smith (2018) Toure and Dorsey (2018) and Watts (1998) pointed out  
10  
11 the necessity of raising awareness about racial, gender, and sexual orientation-based  
12  
13 barriers in teacher and leadership training programs. In fact, School principals themselves  
14  
15 perpetuate stereotypes and discriminatory practices unconsciously, **influencing**  
16  
17 **educational opportunities for students of color and for teacher (Toure and Dorsey, 2018).**  
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21 The literature included addresses gender and race barriers, describing how female  
22  
23 principals must face challenging situations by rebuilding their identity and changing their  
24  
25 leadership and agency practices. This is due to socio-cultural factors that cause an  
26  
27 imbalance of power when they try to assume a leadership role in school management.  
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31 *c) Influence of experience, training and transition in the construction of a*  
32  
33 *professional leadership identity*  
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37 Some studies suggest that professional experience is a determinant in the development of  
38  
39 a leadership identity. Thus, Johnson (2017) demonstrated that critical professional  
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41 experiences drive principals to rebuild their social and professional identity, thereby  
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43 resulting in the development of a leadership identity  
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47 Montecinos, Bush and Aravena (2018) analysed potential differences between senior and  
48  
49 novice principals. The authors observed that novice principals found managing up (school  
50  
51 management aspects) more challenging, while senior principals found managing down  
52  
53 (aspects related to interaction with school staff) more difficult.  
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57 Rigby (2015) documented that previous experience and context are an advantage when  
58  
59 establishing a rapport and obtaining feedback from school members. In accordance with  
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61 Robertson (2017), "even longer-serving principals continue to transform their

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3 professional identities as they manage emotions, make decisions, access professional  
4 learning and interact with others." Therefore, experience is considered an "added value"  
5 in the attainment of successful leadership practices (Mendez-Morse, Murakami, Byrne-  
6 Jiménez and Hernández, 2015)  
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13 In their transition to principalship, principals transform and renegotiate their professional  
14 identity. Connolly, Milton, Davies and Barrance (2018) warned about the difficulties  
15 found in recruiting and retaining school principals. As a result, providing training to  
16 school principals must be a priority. The study conducted by Murakami and Tornsen  
17 (2017) demonstrates that this situation is the result of the way principals "are recruited,  
18 hired, and weighed when appraised" (p. 808).  
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28 A number of studies have focused on educational leadership training and the professional  
29 profile of school leaders (Greer, Searby and Thoma, 2015; Rhodes, Brundrett and Nevill,  
30 2009), whilst other studies were centred mainly on "beginning principals" (Simon, Dole  
31 & Farragher, 2019; Rhodes & Brundrett, 2006; Browne- Ferrigno, 2003; Wallace, 1996).  
32 Greer, Searby and Thoma (2015) reported that training in the resolution of moral  
33 problems should be improved. Future leaders generally prefer standard structured models  
34 for the resolution of complex situations, thereby ignoring higher-level considerations  
35 (post-conventional moral thought). Rhodes, Brundrett and Nevill (2009) and Simon, Dole  
36 and Farragher (2019) described the positive influence of these training programs on  
37 successful leadership. The authors also highlighted the necessity of creating professional  
38 networks for school improvement (Rhodes and Brundrett, 2006). **In this connection,**  
39 **Rayner (2018) argues that principals with a strong professional identity create a trustful**  
40 **and supportive climate in the school community by the adoption of identities based on**  
41 **pedagogical leadership to achieve educational improvement.** Improving school  
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3 performance does not only require changes at local level, but also at a national level based  
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5 on support from national entities and external organizations (Stamopoulos, 2012).  
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8 Becoming a principal entails a professional and identity transition. The studies included  
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10 in our review refer to the importance of a principal's education and training based on  
11  
12 educational leadership, along with the “professional experience” factor being decisive in  
13  
14 the consolidation of a “leader” identity.  
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## 16 17 **Discussion**

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20 International research indicates that educational leadership is a key factor for educational  
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22 improvement in schools. For this reason, in recent decades, the knowledge production on  
23  
24 the professional identity of leadership has increased (Castillo and Hallinger, 2018; Crow,  
25  
26 Day and Moller, 2017; Cruz- González, Domingo and Lucena, 2019). The purpose of this  
27  
28 review was to analyse the scientific literature regarding the leadership identity of school  
29  
30 principals, in order to delve deeper into the characteristics presented in the selected  
31  
32 scientific output and the main themes of the included studies. In addition, we present the  
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34 implications of the findings of these studies for both professional practice and the  
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36 development of future lines of research.  
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### 40 41 *Interpretation of the findings*

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44 Firstly, the results of our SLR revealed that there has been a notable increase in scientific  
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46 production on this subject in the last decade. This is in agreement with other investigations  
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48 such as those of Hursh (2005), Leithwood and Jantzi (2000) or Gumus, Bellibas and  
49  
50 Gumus (2018), which indicate a prominent trend in these studies due to factors such as  
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52 globalization or accountability for educational improvement and therefore, the greater  
53  
54 value of leadership for achieving successful educational outcomes. Secondly, our findings  
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56 are also in accord with the current interest in the development of the professional identity  
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58 of teachers (Schutz, Hong, and Francis, 2018).  
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3 The results of our study have revealed a predominant scientific output from the United  
4 States and the United Kingdom. In spite of this, in our review we can see how in recent  
5 years, geographical diversity has increased with respect to this literature. This data  
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10 accords with the findings of studies such as that of Hallinger (2018), which argues that in  
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15 the last two decades, the literature on leadership and educational management has  
16 expanded its borders outside the “traditional Anglo-American literature”.

17 Further, a description is provided of the relevant findings that were yielded by our SLR.  
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19 It is worth mentioning some of the methodological and theoretical aspects addressed in  
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24 the studies analysed.

25 One of our objectives was to identify determinants of leadership identity in school  
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One of our objectives was to identify determinants of leadership identity in school  
principals. This aim led us to analyse the interplay among the complex components of  
leadership identity. As previously mentioned, leadership identity is dynamic and  
multidimensional, and therefore it should be approached from a holistic, hermeneutic  
perspective.

This is the reason why most of the studies were qualitative, and only a few were  
quantitative. The quantitative design is not suitable for understanding and interpreting the  
experiences and symbolic elements that compose leadership identity, which has a  
humanistic and social dimension that cannot be measured quantitatively. In contrast,  
qualitative analysis is more appropriate for investigating leadership identity.

Some mixed-design studies focused on influential factors such as training and experience  
(Rhodes, Brundrett and Nevill, 2009; Montecinos, Bush and Aravena, 2018). These  
studies examined personal, professional, contextual and demographic variables such as  
gender, ethnicity, and years of experience. In their quantitative study, Greer, Searby and  
Thoma (2015) also used these variables to gather relevant information on decision-

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3 making and problem-solving skills in candidates for principalship. Authors chose these  
4 variables, since the literature has shown that these factors shape leadership identity in  
5 principals.  
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10 **Training for future principals is fundamental to the development of leadership identity.**  
11 **(Payne and Smith, 2018; Simon, Dole and Farragher, 2019). It is necessary to train future**  
12 **principals in their professional development and provide them with personal values**  
13 **compatible with the professional standards and expectations projected in this role. In**  
14 **general, only a few studies were found to focus on the education and training received by**  
15 **future principals, which is a promising avenue for future research. Standard international**  
16 **training programs do not meet the contextual and adaptive nature of educational**  
17 **leadership, which should be addressed in the future.**  
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30 Further, the perceptions and opinions of other school members also shape the professional  
31 identity of principals. Yet, this aspect is not appropriately examined in the literature.  
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33 Further studies are needed in the future to address these aspects.  
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37 There is abundant evidence identifying *educational leadership* as key to student  
38 performance. The role of students should also be examined in future studies in this field  
39 of research. Numerous studies included teachers, deputy head teachers and student  
40 families in their samples.  
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47 A large proportion of studies were based on interviews with key school actors  
48 (principals). Interviews addressed aspects such as the impact of socio-political factors on  
49 the professional identity of principals, which fits with the methodology proposed.  
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51 However, it is worth mentioning that some biases were identified resulting from the self-  
52 report study design. As interviews were based on self-reports, data cannot be extrapolated  
53 to other contexts, as they were provided in very specific contexts.  
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3 However, self-report interviews are very useful ways of gathering organizational and  
4 sociological data in the area of education. The hermeneutic nature of this type of interview  
5 facilitates the understanding and interpretation of professional and social experiences.  
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10 Evidence supports the strong impact of educational policies on the exercise of  
11 principalship and in the development of a professional identity in principals.  
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13 Accountability has become an increasingly important feature of education policies in both  
14 the USA and the United Kingdom, which is demonstrated by the evidence provided in  
15 studies conducted in these countries. This approach is gaining popularity among  
16 educational authorities, which limits the agency of school principals. Therefore, further  
17 studies are needed to investigate whether accountability is a threat to the exercise of  
18 successful leadership.  
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30 The results of our review are consistent with those of international reports (OECD, 2013,  
31 2014) that identify educational leadership as key to student performance and  
32 organizational culture. An example of this could be the study of Bahous, Busher &  
33 Nabhani (2016). Their findings suggest that the organizational culture of the school plays  
34 a decisive role in school improvement. In this way, assertive principals can create a strong  
35 sense of community that promotes the development of positive identities and  
36 improvement of student performance and motivation. Next, we analyse the  
37 recommendations and guidelines provided by different authors in order to identify the  
38 main lines of action proposed.  
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### 51 *Implications for educational authorities and professional practice*

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54 Evidence consistently shows that the development of professional identity is critical if  
55 leadership is to be exercised successfully. A growing number of studies have been  
56 published in recent years on professional identity in teachers (Notman, 2017). However,  
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3 the issue of leadership and professional identity in principals is now gathering interest.  
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5 This is supported by the McKinsey report on educational systems (Barber and Mourshed,  
6  
7 2007), which established an association between school leadership and school  
8  
9 performance. Despite the growing number of studies published on school leadership in  
10  
11 recent years, authors consistently claim that there is a need for studies that clearly identify  
12  
13 successful leadership practices (Orr et al., 2008). Further research, changes in educational  
14  
15 policy reforms and, new laws forcing structural changes are all needed to improve school  
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17 performance.  
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22 **Another important theme drawn from our findings has been the barriers of gender and**  
23 **race in the development of a leadership identity in principals.** The studies analysed  
24  
25 identify barriers encountered by principals when building their leadership identity.  
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27 Female principals find it more difficult to gain school leadership. Principals are  
28  
29 predominantly male, which generates a male-dominated context. This is consistent with  
30  
31 the conclusions drawn from the TALIS 2013 (OECD, 2014) study, which revealed that  
32  
33 although teachers are primarily female, the position of principal is generally held by men.  
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35 Therefore, further studies should be conducted to examine female identities and to better  
36  
37 understand gender-based barriers to principalship. Schein (2001) explained that  
38  
39 management *has historically been associated* with men, whilst certain stereotypes persist  
40  
41 in relation to female managers. Jones (2017) concluded that educational policies should  
42  
43 be aware of stereotypes and fight against them for a more egalitarian society (Murakami  
44  
45 and Tornsen, 2017). Arar and Shapira (2016) recommended that we gain gain insight into  
46  
47 the development of professional identity in female leaders. Thus, society would become  
48  
49 aware of the on-going social changes, which would help to overcome gender-based  
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51 barriers. Murakami and Tornsen (2017) denounced the lack of support for the integration  
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53 of female principals and recommend that further research is conducted to better  
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3 understand "the specific expectations of each country". These studies would help raise  
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5 awareness among future generations.  
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9 Race-based barriers were also identified in the literature. Thus, culture and race are  
10  
11 influential factors in the development of identity. Some authors have coined the term  
12  
13 "democratic racism" (Henry, Rees and Tator, 2010). This term makes reference to the  
14  
15 perpetuation of race-based discriminatory patterns, despite governmental efforts to  
16  
17 promote equality. Future research should seek to assist in the development of *racial*  
18  
19 *literacy* in the educational context and the formulation of a theory on social justice (Toure  
20  
21 and Dorsey, 2018). It is necessary to place the focus on gender and race-based  
22  
23 "microaggressions" (Hernández and Murakami, 2016), which occur in school and pose a  
24  
25 threat to the successful exercise of leadership. To this end, principals should receive  
26  
27 suitable training adapted to the social context. This training should have a moral  
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29 component (Bebeau and Monson, 2008), where principals develop critical self-reflective  
30  
31 abilities (Notman, 2017). Payne and Smith (2018) added that the concepts of  
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33 heteronormativity and heterosexism should also be addressed in leadership training  
34  
35 programs.  
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41 In sum, efforts should be directed towards improving principal training programs and  
42  
43 adapting them to the demands of equality and social justice. Further studies are needed  
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45 on different aspects related to educational leadership from "multiple lenses" such as those  
46  
47 proposed by Foucault. Training program designers should be aware that educational  
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49 policies and local forces influence the development of a leadership identity.  
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## 52 53 54 **Final Conclusions**

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57 The relevance of educational **school** leadership is widely recognized. This study focused  
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59 on principal leadership, and demonstrates that understanding and improving leadership in  
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3 school principals requires gaining insight into their identities. To understand how  
4 principals exercise leadership, we need to be aware of how professional identity is  
5 developed.  
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10 The development of professional identity is a complex and multifaceted process (Lumby  
11 and English, 2009). Professional identity is influenced by numerous factors, which shape  
12 the way of "being" and "doing" of each professional. Improving leadership — and  
13 therefore school performance — requires the identification of the determinants of  
14 professional identity.  
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18 The professional identity of principals is even more complex, since it is a two-fold identity  
19 that involves high professional responsibility (Sackney and Walker, 2006; Duchauffour,  
20 2013; Pelletier, 2017). As evidenced in the literature, the complexity of the role of  
21 principal makes this position somewhat unattractive to teachers. Educational  
22 policymakers should adopt measures that facilitate transition to principalship. In addition,  
23 the quality of their initial training should be improved and adapted to the context.  
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28 Some authors have identified certain barriers that hinder the exercise of principalship.  
29 These barriers — described above — should also be addressed in the training that  
30 principals receive. Awareness on the so-called "glass ceiling" and "racial literacy" should  
31 be gained.  
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38 It is therefore of vital importance to continue research on the construction of the  
39 leadership identity in school principals, focusing on the barriers and crises they encounter,  
40 in order to address this issue internationally and thus improve the quality of schools by  
41 nurturing leaders with strong professional identities without losing sight of the influence  
42 of politics and context.  
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3 This is an emerging field of study that requires further knowledge and more in-depth  
4 analysis. We thus advocate an increase in case studies located in schools, as well as  
5 biographical-narrative investigations that deal with how leadership identity is constructed  
6 and to understand how identity is generated in contrast with how others perceive it and  
7 how they form such an identity.  
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10 Similarly, systematic reviews of the literature are encouraged to identify the past, present,  
11 and the one that awaits us in order to improve the quality of education.  
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## Annex 1. Central theoretical terms of the studies included in our systematic review

Author/year	Central theoretical terms
Amstrong and Mitchell (2017)	Barriers of race and gender in the construction of the identity of “female principals”
Arar and Shapira (2016)	Negotiation of the personal and professional identity of the female school principals in a “traditional cultural context”
Bahous, Busher and Nabhani (2016)	Influence of the professional identity of the principal in the professional development of the teaching staff of the centre.
Boris-Schacter S and Merrifield S (2000)	“Principals as lifelong learners”
Bredeson PV (1993)	“Role transition and role strain for principals’ professional identity in restructured schools”
Browne-Ferrigno T (2003).	Transition of identity from teacher-principal
Carpenter, Bukoski, Berry and Mitchell (2017)	“Social Justice Identity of Principals in a difficult school context”
Connolly, Milton, Davies and Barrance (2018)	Influence of education policy on the professional identity of school head teachers.
Crow, Day and Møller (2016)	The importance of principals’ leadership identity for school improvement
Greer, Searby and Thoma (2015)	The impact of moral reasoning on the identity of future school leaders
Hernández and Murakami (2016)	Barriers of race and gender in the construction of the identity of “female principals”

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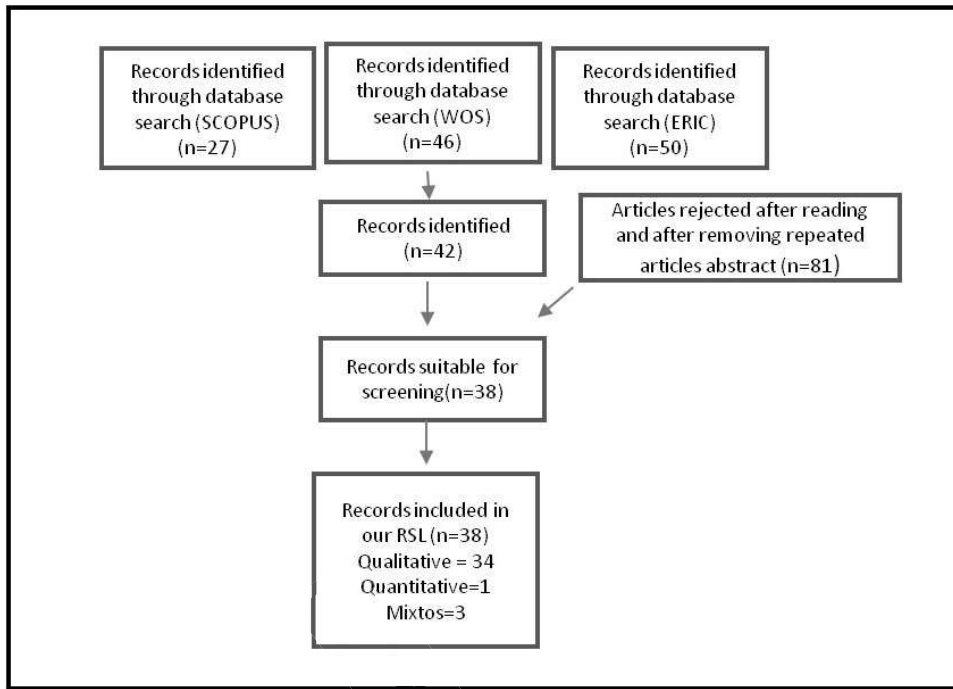


Figure 1. Flow chart of stages of literature search