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## Shadowing School Principals – What Do We Learn (Anew)?

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### ABSTRACT

Shadowing has been used for decades in educational leadership and management research. Yet, there appears to be little academic discussion of shadowing and its related forms or analyses of the method itself. This contribution attempts to further a reflection on shadowing by providing insights into its use as well as its pitfalls and merits. For this purpose, relevant studies from 2017 until 2023 making use of shadowing were analyzed. The results indicate that although the use of shadowing in educational leadership research has increased, methodological discussion and reflection of the method has been only limited.

### Introduction

Methodologically speaking, educational leadership and management research has been largely underpinned by standardized surveys when carrying out quantitative research and interviews when carrying out qualitative research. Beyond these “classic” approaches, other methods, such as observations have been employed to varying degrees of popularity. Among the observational methods, shadowing has been frequently utilized to study the various facets of school principals, though less frequently than in management studies (Bøe et al., 2017; Hughes, 2019). As outlined in Tulowitzki (2019), the origins of shadowing in the educational setting are often attributed to Henry Mintzberg and Harry F. Wolcott. Wolcott conducted what he called “the ethnographic study of a school principal,” consisting of “enumeration, participant observation and interviewing” (Wolcott, 1970, p. 116). He followed a school principal for two years, which quickly earned him the nickname “The Shadow” (Wolcott, 2014). Although he himself did not use the term “shadowing” at the time of his study, his approach was labeled as such by other scholars soon after Wolcott published his research (see, e.g., Grambs, 1973).

Around the same time but unrelated (neither author referenced the other in his work at the time), Mintzberg (1970) studied managers by conducting what he called “structured observation”, a “methodology which couples the flexibility of open-ended observation with the discipline of seeking certain types of structured data” (Mintzberg, 1970, pp. 90–91). This definition indicates that Mintzberg understood structured observation as being a rather flexible, unstructured approach when it came to the observation but that the resulting data produced should be structured (to a certain degree). Mintzberg closely followed the managers and recorded details such as time and place, the type of interaction, and the people involved. This approach was quickly adopted in other fields, including educational leadership and management research. In the educational context, structured observation was quickly used to study the actions of educational administrators (e.g., Wilis, 1980). Over time, the term “shadowing” was also used to refer to studies making use of structured

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observation (e.g., Spender, 1989) and several scholars have pointed out strong similarities between the two approaches (Meunier & Vasquez, 2008). However, a study analyzing 29 shadowing-type studies conducted between 1990 and 2016 found evidence of a lack of definition of the method and – related to the first finding – a certain “fuzziness” in its use (Tulowitzki, 2019).

Since then, a substantial number of studies utilizing shadowing have been published in the field of educational leadership and management research. This raises the question of whether there have been any developments in terms of defining or employing the method. In the context of its ongoing use, it seems important to understand how it is conceptualized and for what purpose(s) it is used. Additionally, shadowing is a method that requires close proximity between the researcher and observed party for extended periods – days and sometimes even weeks or months. The use of shadowing, therefore, can carry significant ethical implications. It seems unclear if and how educational leadership and management studies employing shadowing recognize and address such ethical considerations.

The present study seeks to address the issues raised and continue the reflection on shadowing by analyzing the objectives and parameters of shadowing studies, definitions of shadowing, identified merits and pitfalls, and ethical considerations. Following a brief presentation of various understandings and related criticisms of shadowing and its use in educational leadership and management research, the issue of ethics in shadowing studies is delineated. This is followed by an outline of the methods used to analyze the use of shadowing including its limitations and a presentation of the findings. Finally, the findings and implications for future research are discussed.

## Shadowing and Its Use in Educational Leadership and Management Research

Upon considering previous works that deal with or make use of shadowing as a research method, it becomes apparent that different understandings of shadowing exist. Even regarding the question of whether shadowing is a methodological research approach or a research method, there is no consensus in the current discourse (for a discussion of different understandings in the literature, see Krein, 2023). Thus, the explanations vary between (more) quantitative understandings, which emphasize the quantification or classification of activities (e.g., Martinko & Gardner, 1990), and qualitative understandings. Following the latter, Czarniawska describes shadowing as “observation on the move” (Czarniawska, 2014, p. 43) as the researcher follows the participant as they navigate through their everyday work. Thus, shadowing can enable insights into people’s everyday experiences, dynamics, and activities, which can provide a comprehensive understanding of a person’s professional life (Czarniawska, 2018).

In shadowing, observations usually constitute a core activity of the research process by collecting data alongside actions, rather than through reconstructions of past events, as is common in interviews (Hughes, 2019; Quinlan, 2008). Furthermore, shadowing “implies fixing the observation on a person or an object instead of a location” (Sirris et al., 2022, p. 139). However, there seems to be little consensus regarding the degree of structure and of interaction between the researcher and observed person(s) (Progin & Tulowitzki, 2022). Similarly, the possible combination of shadowing with one or several additional methods, such as interviews, can vary.

Numerous criticisms and advantages of shadowing can be found in the literature. With reference to more structured shadowing variants, some researchers have criticized structured observation in educational leadership research for failing to adequately capture the complex and multifaceted activities of school principals (Gronn, 1982; for a more detailed discussion of the criticisms of structured observation, see Tulowitzki, 2019). Representatives of a more qualitative understanding countered similar criticisms by arguing that shadowing in an open, flexible variant is actually suited for capturing complex activities because it allows for focusing on the simultaneity of events in different settings, as well as the nonsimultaneity of experiences and growing number of actions and processes (Czarniawska, 2014; Krein, 2023). Other criticisms often leveled at qualitatively and quantitatively

oriented variants of shadowing are “the high level of resourcing needed and the time it takes to undertake such studies” (Earley & Bubb, 2013, p. 20).

Additionally, ethical aspects can pose a challenge when using shadowing. As shadowing involves the direct observations of people in their (professional) daily lives, its immersive as well as relational and potentially even intimate character needs to be considered (Bøe et al., 2017). Ethical aspects are noticeable here at different levels: First, it is important to be aware that shadowing can build intimacy and trust between the observer and observed person, which Czarniawska (2007) describes as “a peculiar twosome” (p. 10). On the one hand, a relationship like this can bring benefits, such as field access to nonpublic areas (Bussell, 2020). On the other hand, this “twosomeness” can make it challenging to maintain professional interaction and a balance between an outsider and insider perspective on the part of the researcher (Bøe et al., 2017; R. Gill et al., 2014). Second, shadowing always has an impact on the associated institution and its members, such as the school whose school leader is followed (Johnson, 2014), especially if (in terms of research economics) the consent of all persons encountered was not obtained or they may not have all been informed beforehand, which sometimes requires the researcher to “make ethical judgements in the moment” (Ferguson, 2016, p. 23). Also, if the school leader approves the shadowing, other people might feel pressured to also cooperate. In this context, it is also important to consider issues of data protection or the involvement of third parties who, although not always directly present in the school, might unknowingly or without informed consent participate in the research, such as parents.

Overall, there seem to be only few discussions of definitions of shadowing, methodological reflections, and discussions of ethical aspects. Therefore, a better understanding of the conceptualizations of shadowing and ethical considerations were the primary goals of our analysis. The methodological approach and questions guiding our analysis are presented next.

## Methods and Sources

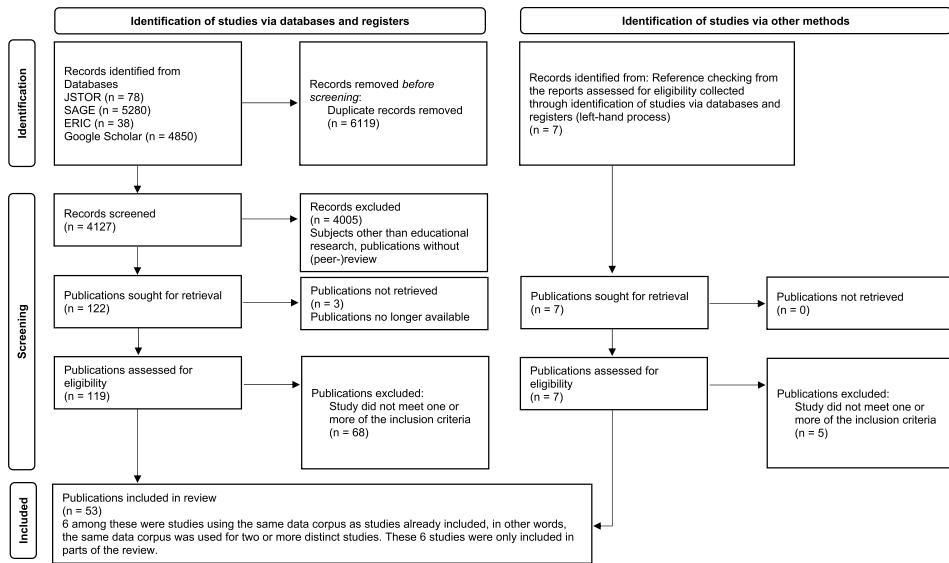
The process of identifying relevant studies was modeled after PRISMA (Page et al., 2021). It consisted of (1) searching for potentially relevant publications, (2) screening the findings in order to refine them (3) selecting relevant studies according to inclusion/exclusion criteria, and (4) analyzing the selected studies meeting the inclusion criteria (see Figure 1).

### **Step 1: Search for Potentially Relevant Publications**

The JSTOR, SAGE, ERIC databases, and Google Scholar were searched to collect relevant studies from the past six years (2017 to early 2023). The keywords used for searching were “shadowing,” “shadow\*,” “structured observation,” combined with “school leader,” “principal,” “headteacher,” or “leadership.” The findings were then filtered, where technically possible, to include only studies related to “education,” “educational research,” “schools,” and similar terms, depending on the database. This search produced over 7000 possibly relevant publications, often containing duplicates. References were uploaded into a Zotero library, where possible using automation scripts to expedite and facilitate the process. Duplicates were then removed using the “Duplicate Detection” feature of the software.

### **Step 2: Screening Procedures to Refine Findings**

The findings were then screened based on available abstracts and metadata by eliminating all publications not primarily located in the field of educational research. Additionally, all publication types not associated with (peer-)review processes were eliminated. This included the elimination of all types of publications except for peer-reviewed journal articles, chapters in book publications with peer review procedures and PhD theses.



Flowchart based on: Page MJ, McKenzie JE, Bossuyt PM, Boutron I, Hoffmann TC, Mulrow CD, et al. The PRISMA 2020 statement: an updated guideline for reporting systematic reviews. *BMJ* 2021;372:n71. doi: 10.1136/bmj.n71. For more information, visit: <http://www.prisma-statement.org>

Figure 1. PRISMA flow chart of procedures used.

### Step 3: Selection of Relevant Studies According to Inclusion/Exclusion Criteria

For this step, the full texts of the publications were retrieved. In three instances this was not possible due to the publications no longer being available. The retrieved full-text publications were next assessed according to the following criteria to be included in the analysis of the present contribution:

- The study was required to be located in the field of educational leadership and management research.
- A focus of the study needed to be on school principals, headteachers or superintendents (including early childhood educational settings, excluding higher educational institutional settings).
- Shadowing had to be an exclusive method or part of the main methods used for data collection.
- The publication date of the study needed to be 2017 or later as studies published earlier had been analyzed in a previous study (Tulowitzki, 2019).
- The study needed to be in English.
- The study had to explicitly make use of one of the following terms: “shadowing,” “shadowed,” “structured observation,” or “Mintzberg-type study.” Over the course of the analysis, this criterion was refined to also include studies in which none of these terms were used but where either the description of the method closely matched descriptions of shadowing or the key authors referenced in the methods sections were authors associated with structured observation or shadowing-type approaches (e.g., Mintzberg or Czarniawska).

Although we understand shadowing to be a qualitative method, we tried not to let this guide our search. This was done to ensure that all contributions that met the previously established criteria could be included in the review, regardless of whether the authors viewed shadowing more as a quantitative or qualitative approach.

A total of 53 studies were identified as meeting the inclusion criteria.

#### **Step 4: Analysis of the Selected Studies Meeting the Inclusion Criteria**

The selected studies were reviewed, analyzed, and compared based on the following questions:

- (1) What are the aims of the studies?
- (2) How is shadowing defined by the author(s)?
- (3) What are the major parameters of the shadowing activities (duration, observers, observed persons)?
- (4) What are the categories of observation?
- (5) In conjunction with what other – if any – methods is shadowing used?
- (6) What, if any, merits or pitfalls of shadowing are discussed?
- (7) What, if any, ethical considerations concerning shadowing are made?

To answer these questions, all publications were analyzed using a qualitative content analysis approach (Krippendorff, 2019). At the start of this part of the analysis, it became apparent that a small number of publications were based on the same overarching study or data corpus; that is, the author(s) had written multiple publications covering different topics based on the same set of data. This was the case for the following articles: Gawlik (2018a, 2018b); Hughes (2019) and Hughes et al. (2023); Mahfouz (2018, 2020) and Mahfouz et al. (2021); Midha (2020, 2022); Opazo et al (2023a, 2023b). For the first five research questions, these publications were counted only once each because there seemed to be no significant differences regarding the relevant passages in the publications, hence resulting in a total of 47 studies. There were, however, indications that merits, pitfalls, and ethical considerations were discussed differently within these studies. As a result, all 53 studies were considered for the last two research questions.

#### **Limitations**

Despite numerous efforts to identify relevant studies it is possible that additional studies that match the criteria for inclusion exist. The scope of the study is further limited by the search terms and databases used. Also, although some comparisons of parameters (like duration of observation) could be made, it was not possible to assess the merit of a study or the scope and validity of its results or to compare the findings gathered from shadowing-type studies with the findings from other approaches. Finally, it is important to note that the scope of the present study is further limited by the analyzed time frame (only studies from 2017 until 2023).

#### **Findings**

##### ***What Are the Major Aims of the Studies Examined?***

Almost all the studies aim to explore the practical aspects of being a school principal by using shadowing and/or other observations as a method.

The studies' aims can be classified into the following categories: *conducting research on leadership practices* (31 out of 47 studies); *studying the implementation of certain goals, programs, or processes* (6 out of 47 studies); *finding out about the lived experiences of school principals* (7 out of 47 studies); *exploring the beliefs, opinions, and/or identity of principals* (5 out of 47 studies); *examining how principals support their students' postsecondary preparation* (1 out of 47 studies); *exploring influences of professional learning of principals* (2 out of 47 studies); *examining emotional states of principals and how they cope with them* (1 out of 47 studies); and *discussing shadowing as a methodology for researching educational leaders and leadership* (3 out of 47 studies). It should be noted that some studies fit into multiple categories and therefore

appear multiple times. A full overview of the studies, sorted according to their aims, can be found in [Table A1](#) in the [Appendix](#).

### **How Is Shadowing Defined?**

The status of shadowing as a method or methodology is defined in various ways and to various degrees. In three out of the 47 studies, the term “shadowing” is neither defined nor even mentioned but the method used is simply referred to as “observation” (Bezzina et al., 2018; Neupane et al., 2022; Noman et al., 2018).

In 39 studies, shadowing is mentioned, but the term is either not defined, or the definition is vague. In nine out of these 39 articles, the definition can be summarized as following the principals during their day at work (Bayeni & Bhengu, 2018; Bhengu et al., 2020; Bøe et al., 2022; Heikka, Kahila, et al., 2022; Heikka, Suhonen, et al., 2022; Jerdborg, 2021; Pollock & Hauseman, 2017; Rivera McCutchen, 2021; Taole, 2019). Similarly, shadowing is also defined as “following the target participant constantly, like a shadow” (Heikka, Kahila, et al., 2022, p. 155) during their workday (similar in Bøe et al., 2022, p. 4; Cherbow et al., 2020, p. 454; Heikka, Suhonen, et al., 2022, p. 16). Likewise, shadowing is defined as “following a member of an organization over an extended period of time” (Mkhize, 2017; similar in, p. 82; Opazo et al., 2023a, 2023b). In one instance, shadowing is used as an umbrella term with the authors explaining that “shadowing includes techniques such as participant or nonparticipant observations” (Bayeni & Bhengu, 2018, p. 5). In two other studies, the authors generally speak of “participant observation” (Niño, 2018) or use the term shadowing synonymously with “observation” (Kouali, 2017). Gómez-Hurtado et al. (2020) refer to another author for the definition (reference to Czarniawska, 2007), and in the study by van den Boom-Muilenburg et al. (2022, p. 301), shadowing is defined as semi-structured participant observation based on Tulowitzki (2019). In the study by Nicolosi (2020), Mintzberg’s “structured observation” is named as the method used and shadowing is later mentioned.

In a more elaborate definition, Bøe et al. (2017) conceptualize shadowing not as a method, but as an interpretivist methodology, meaning a way to support the understanding underlying theories and concepts. The authors further explain this by pointing out power relationships between the person doing the shadowing and the person being shadowed. Here, the authors follow Mintzberg’s standpoint, viewing shadowing as a reflective approach. Three other studies also contain a more detailed definition of shadowing: Hughes (2019) offers a description of Wolcott’s and Mintzberg’s approaches by comparing shadowing to participant observation, pointing out that the participants have more control over their data in shadowing compared with participant observation (see also Hughes et al., 2023). Like Bøe et al. (2017), Hughes (2019) and Hughes et al. (2023) quote Czarniawska’s expression of shadowing as an “observation on the move” (Czarniawska, 2014, as cited in Hughes, 2019, p. 67 and Hughes et al., 2023, p. 1134). They also refer to the term “conspicuous invisibility,” which “is where the researcher is present, but not really present, negotiating their distance within proximity to participants and maintaining an identity as a researcher while at the same time forming relationships with participants” (Hughes et al., 2023, p. 1134; drawing on Quinlan, 2008). In line with Bøe et al. (2017), Hughes et al. (2023) view shadowing as a reflective approach. Shadowing, according to Hughes, gives the researcher an opportunity to “experience the everyday events that shape the participant’s days, examining opinions and behavior concurrently” (Hughes, 2019, p. 70). Kurland also offers a more elaborate explanation, defining shadowing as a holistic method that provides insights into the daily work of principals and helps in understanding the complexity of schools and their “interactions with the school community” (Kurland, 2019, p. 713). Finally, Lee (2017) highlights the more intimate involvement and close proximity to the participant in his definition, illustrating how the researcher is always at the participant’s side: “When the participant is running to attend a meeting, the researcher is running with them; when the participant is talking with colleagues, the researcher is there with the participant” (Lee, 2017, p. 96).

### ***What Are the Main Parameters of the Shadowing Activities?***

In most of the examined studies (38 out of 47), the researchers focus exclusively on one or several principals or educational leaders (e.g., Bayeni & Bhengu, 2018; Gawlik, 2018a, 2018b; Midha, 2020, 2022; Rivera McCutchen, 2021). In a few studies, teachers have also been observed (Kazemi et al., 2022; Netshitangani, 2018; Walls, 2023) or the wider school context (Noman et al., 2018).

Studies differ in the number of principals or head teachers investigated, ranging from one to 37. Seven studies focus on one principal (Hughes, 2019; Hughes et al., 2023; Kazemi et al., 2022; Netshitangani, 2018; Niño, 2018; Noman et al., 2018; Rivera McCutchen, 2021). Four studies focus on two principals (Gómez-Hurtado et al., 2020; Leu Bonanno, 2023; Noor & Nawab, 2022; Walls, 2023). Ten studies focus on three principals (Bayeni & Bhengu, 2018; Bøe et al., 2022; Clayton & LaBatt, 2019; Fabry et al., 2022; Heikka, Suhonen, et al., 2022; Kim & Weiner, 2022; MacDonald, 2023; Neupane et al., 2022; Rigby et al., 2021; Toure & Dorsey, 2018). Five studies focus on four principals (Cherbow et al., 2020; Gawlik, 2018a, 2018b; van den Boom-Muilenburg et al., 2022; van Vooren, 2018; Wong, 2019), and two studies focus on five principals (Bhengu et al., 2020; Pollock & Hauseman, 2017). Seven studies focus on six principals (Bøe et al., 2017; Heikka, Kahila, et al., 2022; Kouali, 2017; Mkhize, 2017; Nicolosi, 2020; Tam, 2019; Taole, 2019). De Lisle et al. (2020) focus on seven principals, and four studies focus on eight principals (Bezzina et al., 2018; Brennan & MacRuairc, 2019; Duncheon & DeMatthews, 2018; Midha, 2020, 2022). Seven studies focus on more than ten principals (L. J. Gill, 2018; Goldring et al., 2019; Honig & Rainey, 2019; Jerdborg, 2021; Lee, 2017; Mahfouz, 2018, 2020; Mahfouz et al., 2021; Opazo et al., 2023a, 2023b). The study with the highest number of principals observed was by Honig and Rainey (2019), encompassing 37 principals.

In most of the studies (26 out of 47), one researcher – usually the (lead) author – carried out the observation(s). In eleven studies, the observations were conducted by two or three researchers. In another study, it was pointed out that graduate students conducted the shadowing and not the author (van Vooren, 2018). In nine studies, the number of observers could not be clearly identified.

The duration of observation varies quite strongly between studies, ranging from a couple of days to several months (see Table A2 in the Appendix). Accordingly, the number of sessions of observations (e.g., how many times the researcher(s) go to a school and conduct an observation), also varies. Often, relevant information could not be identified. For example, in several studies (Clayton & LaBatt, 2019; Kazemi et al., 2022; Rivera McCutchen, 2021; Toure & Dorsey, 2018; Walls, 2023) there is some information on the total duration of the observations, but the duration of individual observations (hours, days) could not be discerned. Furthermore, in most studies (42), we could find no information regarding when the observations started or ended. Only in four studies was such information offered: Bayeni and Bhengu (2018) state they began their observations when the principals started their working day and stopped when they left to go home. Bezzina et al. (2018) also observe the principals during their working day, as well as after they finished working. Similarly, Gawlik (2018b, 2018a) states that she started her observation around 30 minutes before school started and ended it when the students were dismissed. Cherbow et al. (2020) conducted their observations only during a specific class. Overall, only a few details regarding the parameters of observation could be found.

### ***What Are the Major Categories of Observation Across the Studies We Examined?***

In most (35 out of 47) of the analyzed studies, there are either no predetermined categories of observation, or they are not explicitly stated. Studies in which the researchers observed what principals do in their everyday work, in what leadership practices they engage, and other general purposes of this kind were counted in this first group, that is, not indicating categories of observation. In some cases, this seems to be linked to a more ethnographic understanding of the method (e.g., Toure & Dorsey, 2018). The study by Pollock and Hauseman (2017) occupies a special position, as both structured and less structured observations were conducted simultaneously. For the remaining studies, there were several categories of observation that could be identified.



In four studies, the time use of principals appears to be a primary category of observation (Bezzina et al., 2018; Gawlik, 2018a, 2018b; Goldring et al., 2019; Kouali, 2017). Bezzina et al. (2018) focus on the distribution of time on management, administrative and personal matters, scheduled and unscheduled time, location of work, and the personal contacts of principals. Similarly, Goldring et al. (2019) use the instructional, managerial, and personal time use of principals as categories. Gawlik (2018b, 2018a) lists administrative tasks, professional growth, instruction and curriculum, and fostering relationships as categories. Kouali (2017), who also investigates administrative, mixed, and instructional tasks, is the only author out of the previously mentioned ones who does not appear to take (inter)personal matters as a category into account. In the study by van Vooren, a checklist is used with seven themes – “administration, organizational leadership, instructional leadership, program development, internal relations, external relations, and other” (van Vooren, 2018, p. 52) – and a checkmark is made every five minutes to track how much time was being spent on each task.

In four other studies, the researchers use the nature of the activities and interactions of educational leaders as focal lenses or categories of observation. Nicolosi (2020) utilizes Mintzberg’s system, recording the length of each activity and noting the location, purpose, and nature of each activity as well as the people with whom interactions were made. In another study, Gómez-Hurtado et al. (2020) use the following categories of observation: “the type of activity carried out; the agents involved; the content and purpose of the meeting; the principal’s role in the action and the others involved; the location and spatial distribution of the participants; the social climate during the activity; the date, time of day and approximate duration of the session or meeting” (Gómez-Hurtado et al., 2020, p. 4). Similarly, in the study conducted by Lee, activities are categorized “in terms of when, where, with whom, what, how and why and notes for explaining related education policies or education systems” (Lee, 2017, p. 100). Pollock and Hauseman (2017, p. 94) use the following categories: time of observation, location, activity, purpose behind the activities, other people involved, means of interaction (face-to-face or e-mail, text messaging etc.). Finally, Tam (2019) focuses on interactions using three categories: “1. What do the positional leaders say, do, and distribute? 2. How do the significant others respond? 3. What are the responses of leaders when the significant others voice out their opinions or make reports of their progress?” (Tam, 2019, p. 718).

In the studies by Opazo et al. (2023b, 2023a), a structured observation sheet is used for the observations and subsequently analyzed using pre-established and emergent codes. Major trends of these codes are (a) information about the institutional context, (b) information about the early childhood education and care centers, and (c) information on the principals (e.g., professional trajectory, practices of leadership, etc.).

### ***In Conjunction with What Other, if Any, Methods Is Shadowing Used?***

In almost all of the studies analyzed (45 out of 47), interviews are used as additional research methods. In over half of the studies, documents are analyzed (24 out of 47 studies). The types of documents analyzed include surveys (Rivera McCutchen, 2021), autobiographies of school principals (MacDonald, 2023), media coverage of school principals (Rivera McCutchen, 2021) and other unspecified documents. In several studies (13 out of 47), observations at the school sites were conducted in addition to those reported to be part of the shadowing approaches (e.g., Duncheon & DeMatthews, 2018; Kazemi et al., 2022; Kurland, 2019). In the study by Bhengu et al. (2020), for example, “participant observation” is mentioned in addition to shadowing without further explanation. Five studies include video recordings (Bøe et al., 2017, 2022; Heikka, Kahila, et al., 2022; Heikka, Suhonen, et al., 2022; Midha, 2022; Mkhize, 2017). The studies conducted by Bøe et al. (2017, 2022) additionally made use of recall interviews, in which the researchers showed the observed parties excerpts of video recordings made of them during the observational phase. Other methods include focus groups (Bhengu et al., 2020; Kim & Weiner, 2022; Leu Bonanno, 2023), audio recordings (Midha, 2022), and surveys (Goldring et al., 2019; van Vooren, 2018).

Additional methods are usually positioned as a way to enrich the findings from shadowing and/or expand upon them and/or to triangulate or confirm the findings. For example, Noman et al. (2018) mention that the observational data reflects the findings from the interviews. In a similar vein, Walls (2023) explains that the observational data gathered through shadowing was “useful to clarify interview data; as Corbin and Strauss argue, observation is important because “it is not unusual for persons to say they are doing one thing but in reality they are doing something else” (Walls, 2023, p. 7).

### ***What, if Any, Merits or Pitfalls Are Discussed in the Studies We Examined? What Differences and Common Themes Do We Find?***

In 36 out of the 53 studies, a discussion of shadowing containing merits or pitfalls could not be found. In some studies, more general merits and/or pitfalls are pointed out, for example, concerning ethnographic studies in general. For this section, only references specifically made to shadowing or observations have been considered.

#### ***Merits***

One often-touted merit lies in the detailed and differentiated insights that can be gathered through shadowing. Bayeni and Bhengu perceive shadowing as “useful in revealing subtleties of perspectives and purposes shaping those actions in the real-time context of an organization” (Bayeni & Bhengu, 2018, p. 5). Similarly, Hughes (2019), Lee (2017), and Mahfouz (2020) state that shadowing allows for a richer understanding of the context, giving “insight into actual events that involve the Educational Leader rather than a reconstruction of previously occurring events as found in interview collection techniques” (Hughes et al., 2023, p. 1138). According to Heikka, Kahila, et al. (2022), shadowing offers rich descriptions of leadership enactment. Along the same lines, MacDonald (2023), Niño (2018), and Jerdborg (2021) note that shadowing is useful to observe practices and compare these observations with the self-reported (e.g., in interviews) practices of the principals. A similar point is made by L. J. Gill (2018), who underlines that shadowing provides “an opportunity to see a facet of the principal not provided by an interview” (L. J. Gill, 2018, p. 98). MacDonald further remarks that the observations also contribute “to an understanding of the habitus of the educational leaders and how fields and capital were implicated in their practice” (MacDonald, 2023, p. 6).

Another merit lies in multiple learning opportunities. Several authors express that they see shadowing as a learning opportunity – not just for the researchers, but for the participants as well. For example, Bezzina et al. state that the principals viewed the conversations with the researchers in which they could reflect their practices as a “learning opportunity” (Bezzina et al., 2018, p. 845). Bøe et al. (2017) find that the participants also benefited from shadowing and/or from being filmed and being able to watch themselves because this encouraged them to reflect on their own actions as a leader. Another merit Bøe et al. see is that shadowing, if thought of as a reflexive method, can “create democratic participation between researchers and participants” (Bøe et al., 2017, p. 618). Hughes views shadowing as a reflexive approach as well (Hughes, 2019, p. 190) but states that participants have more control over the data collection with shadowing compared to other types of observation: “In shadowing, participants have some degree of control over the data collection by firstly controlling what the shadower sees and, secondly, by their interpretation and explanation of what was seen” (Hughes, 2019, p. 75; see also Hughes et al., 2023, pp. 1134–1135). Hughes concludes that shadowing comes “with benefits not just for researchers but the potential to contribute to the professionalization of the sector” (Hughes, 2019, p. 190).

Mahfouz (2018) sees the presence of the shadower as beneficial to the shadowee, explaining that her presence while shadowing reminded the principals of practicing their leadership skills and reflecting on their actions. This, however, is in direct contrast with the belief of some other authors, as discussed below.

### Pitfalls

Contradictory to Mahfouz' opinion, Bøe et al. (2017) suggest that the behavior of the participants could be shaped, or, according to Lee (2017), even disturbed by being shadowed/observed. Along the same lines, Hughes (2019) states the following:

[S]hadowing can make people feel judged, exposed or critically evaluated so at times they might act in ways they would not normally act when no-one is watching them closely. As mentioned earlier, I could not always be sure that the behaviour I was seeing was not regulated for my benefit. Debriefing sessions helped with this. (Hughes, 2019, p. 191)

These debriefing sessions could also counteract a Hawthorne-type effect, for example by the researcher asking “at the end of each day’s shadowing, if this is a typical or normal day (Gill, 2011; Gilliat-Ray, 2011) and if and how it varied from others” (Hughes, 2019, p. 193). Hughes (2019, p. 191) suggests in addition: “Scheduling a final discussion with participants in which they reflect on the shadowing process could provide an opportunity for further refinement of this method of data collection.”

The largest discussion on the pitfalls of shadowing is offered by Hughes (2019). Referencing Czarniawska, she points out “that shadowing can be psychologically uncomfortable for some participants, and that courage and trust are needed by both shadower and shadowee” (Hughes, 2019, pp. 68–69). This issue is also referred to in Hughes et al. (2023). Similarly, the aspect of shadowing possibly being stressful for the participants is pointed out by Heikka, Suhonen, et al. (2022). Discussing her position as a researcher during the shadowing process (2019, p. 72), Hughes sees a possible reason for this in a power imbalance between researcher and participant. Being “a lecturer in a tertiary setting, and attachment to a university, brought with it a power imbalance, and I acknowledged that participants might have felt somewhat intimidated by my presence at the site” (Hughes, 2019, p. 72; see also Hughes et al., 2023). However, here she shares Bøe et al.’s opinion that “shadowing as an interpretive methodology can ‘balance the power dynamics by highlighting the process of interaction between the researchers and the participants’ (Bøe et al., 2017, p. 615).” This quote is also referred to by Hughes et al. (2023). Hughes further points out that the more time she spent “with the group, the more comfortable we were with one another” (Hughes, 2019, pp. 191–192). Discussing how to balance power dynamics, Hughes (2019) draws on Quinlan (2008): “Quinlan (2008) suggests a preliminary meeting as an important step in balancing the power dynamics between the researcher and participants. The researcher then makes it very clear about the purpose of shadowing, emphasizing that it is not aiming to assess and examine practice and highlight weaknesses” (Hughes, 2019, p. 192). Similarly, Bøe et al. (2017, p. 10) quote a participant stating that meeting up with the researcher prior to the shadowing was helpful as it reassures the participant that they are being observed in their daily tasks but not assessed. This suggests that preliminary meetings could help mitigate a possible discomfort of participants.

Other expressed challenges of shadowing are that it is time-consuming and that it generates a large amount of data (Heikka, Kahila, et al., 2022). In addition to the large amount of data, Lee (2017) raises issues such as confidentiality, researcher subjectivity, and access to participants willing to be shadowed. The latter is also referred to by Toure and Dorsey (2018). Linked to the issue of big data is that of small sample sizes and thus of the scope and generalizability of any findings (see Kurland, 2019; Netshitangani, 2018; Rivera McCutchen, 2021). Because “[d]ue to limitations such as time and the scope of the research, the context is quite specific” (Hughes, 2019, p. 194), the results appear to be contextually bound. Finally, Niño observes that the researcher who goes into the field always brings a certain perspective with her or him; thus, the observation is not “sterile” (Niño, 2018, p. 268). Along this line, Toure and Dorsey (2018) claim, though unsubstantiated, that some of the observed events appeared to be staged.

Furthermore, Pollock and Hauseman (2017) point out a content-related topic: Whereas both more structured and less structured types of shadowing observations can generate data on “1. What tasks principals were engaged in, 2. The frequency of these engagements, 3. The duration of these behaviors, 4. The location of these events, and 5. Who was involved” (Pollock & Hauseman, 2017, p. 95), neither of the observation types leads to an answer of “the ‘why’ question: Why were principals engaging in the

work that the observers witnessed?” (Pollock & Hauseman, 2017, p. 95), although the purpose behind the activities was recorded during the observations.

An additional challenge is that ethical issues may arise, for example, in maintaining a professional relationship with the participants without being their friends (Hughes, 2019) or knowing when it is appropriate to be present and not (Heikka, Suhonen, et al., 2022; see also Pollock & Hauseman, 2017). Therefore, ethical considerations become relevant to adequately conduct studies with shadowing-type approaches (Bøe et al., 2022).

### ***What, – If Any, – Ethical Considerations Are Made?***

In analyzing the studies, attention was also paid to whether – and if so, which – ethical aspects were addressed regarding shadowing as a research method and in the discussion or reflection of the respective methodological procedure. Of the 53 publications included, only 16 deal with ethical aspects at all. In the remaining 37 publications, ethical aspects of shadowing and, thus, of the researchers’ own methodological approach are not explicitly considered, even in cases where ethical aspects of school principals’ actions are a subject of the studies (e.g., Clayton & LaBatt, 2019; Kurland, 2019; Neupane et al., 2022; Rivera McCutchen, 2021). For publications that address ethical aspects, a distinction can be made into three categories based on the extent of consideration: (1) studies that give ethical aspects their own priority and also embed them methodologically, (2) studies that refer to and explain adherence to ethical standards, and (3) studies that name considerations of ethical aspects but do not address them in more detail.

### ***Ethical Aspects As Part of the Methodological Discussion***

Within the data corpus, a total of eight publications were identified in which the authors discuss ethical aspects in a significant manner and also embed them methodologically (Bøe et al., 2017, 2022; Heikka, Kahila, et al., 2022; Heikka, Suhonen, et al., 2022; Hughes, 2019; Mkhize, 2017; Opazo et al., 2023b; Taole, 2019). In all these publications, the authors point out that shadowing is an immersive and intense method for both participants and researchers (see, e.g., Heikka, Kahila, et al., 2022, p. 156). Therefore, “conducting shadowing requires ethical consideration during the whole process” (Bøe et al., 2017, p. 617) and an ethical responsibility “on the move” (Bøe et al., 2017, p. 607, 2022, p. 4; Hughes, 2019, p. 74). The studies also point to the special relationship between the shadower and shadowee that can develop through the long period of observation and discuss implications for data collection based on this (Bøe et al., 2017; Heikka, Kahila, et al., 2022; Heikka, Suhonen, et al., 2022; Hughes, 2019).

With regard to their own research practices, the authors refer to ethical standards that guide them (see, e.g., Bøe et al., 2017, 2022; Hughes, 2019; Mkhize, 2017; Taole, 2019) and explain how these aspects are taken into account in the individual steps of the research process and in the implementation of the research methods (Bøe et al., 2017; Heikka, Suhonen, et al., 2022). In this context, detailed information is provided to the participants (Bøe et al., 2017, 2022; Heikka, Kahila, et al., 2022; Heikka, Suhonen, et al., 2022; Hughes, 2019), and the writing, obtaining, and retention of informed consent forms are explained (see Heikka, Kahila, et al., 2022; Hughes, 2019). Furthermore, the assurance of anonymization and confidentiality (see Bøe et al., 2017; Mkhize, 2017; Opazo et al., 2023b; Taole, 2019) is emphasized, as well as the voluntary nature of participation and possibility of withdrawing from the study (see Opazo et al., 2023b; Taole, 2019). Furthermore, Opazo et al. (2023b) explain, for example, that any request by participants for a brief interruption of the shadowing was considered (see p. 197; for consideration of privacy, see also Bøe et al., 2017). In this context, Heikka and colleagues (Heikka, Kahila, et al., 2022; Heikka, Suhonen, et al., 2022) also report the possibility for participants to ask questions at any time or also the sensitivity of the researchers regarding whether the data collection was appropriate and ethical in different situations (see also Bøe et al., 2022). As a further point, sample selection is also explained to rule out concerns about coercion to participate (see Opazo et al., 2023b). Finally,

there are also explanations of the procedure regarding anonymization or pseudonymization of data, research data management, and data protection (Bøe et al., 2017; Hughes, 2019; Taole, 2019).

### ***Ethical Aspects As Reference to Standards***

Another six publications could be assigned to a second group of contributions, namely those that only refer to and explain compliance with ethical standards (see Bhengu et al., 2020; Fabry et al., 2022; Lee, 2017; Netshitangani, 2018; Noor & Nawab, 2022; van den Boom-Muilenburg et al., 2022). These studies predominantly include explanations for providing participants with information regarding the study and voluntary nature of participation, obtaining informed consent, and anonymizing or pseudonymizing and deleting data. The ethical standards referenced by the studies are predominantly standards of the authors' respective institutions (e.g., Lee, 2017; Netshitangani, 2018; van den Boom-Muilenburg et al., 2022) or research communities such as the British Educational Research Association (BERA) (Noor & Nawab, 2022). Further elaboration such as the consideration of ethical aspects and their relevance to shadowing as a research method is lacking. It is also noticeable in this group of publications that all comments on compliance with ethical standards are rather brief and rarely exceed the length of up to half a page.

### ***Ethical Aspects As One Among Many***

Finally, two publications can be assigned to the final category, that is, ethical aspects as one component of many during the research process (see Pollock & Hauseman, 2017; Tam, 2019). However, explanations of the methodological background and consideration of these aspects are (largely) absent. Tam (2019, p. 4) merely refers to consent forms and “ethical guidelines,” but without explaining them – in contrast to the work of the second group. Pollock and Hauseman (2017) do not explicitly point out ethical considerations but note that principals may have to deal with sensitive issues. Furthermore, the authors mention that at times, “parents and teachers may not want observers present” (Pollock & Hauseman, 2017, p. 91). A detailed or transparent explanation of the research-practical consideration of ethical aspects or the guidelines mentioned does not take place in either of the publications.

Given these results, it can be stated that ethical aspects in analyzed shadowing studies in school leadership research have, with a few exceptions, only been dealt with marginally or represent a blind spot in large parts.

## **Discussion**

Based on the number of studies analyzed in this contribution, one conclusion that can be drawn is that shadowing continues to enjoy a certain popularity in educational leadership research. This becomes particularly clear when considering that more studies were analyzed in this study than in Tulowitzki (2019), but the publication period considered now only covers seven years (2017–2023). Although such an apparent increase in the use of “shadowing” as a research method also suggests a methodological development, the results of our analyses do not support such a conclusion. Although the analyzed studies included observations that were termed “shadowing” or could be interpreted as “shadowing” based on the description of the (participant) observation methods used in the studies (Neupane et al., 2022; Noman et al., 2018; see also the definition section in the findings), a precise and elaborate definition of “shadowing” was missing in most of the publications. It therefore remained largely unclear what understanding of the method the respective studies were based on. This also appears relevant given the different, often vague explanations of the methodological approach, particularly in view of the parameters of shadowing chosen by the authors.

Generally, the studies making use of shadowing contained little information on the conceptualization and use of shadowing. Especially in contexts where the term “observations” was used, we were able to show that these, like shadowing, are often only marginally explained. While many studies aim to examine the practices of school leaders through these very observations, without a detailed description of the observation procedure – and possibly anchoring it to an established paradigm – it

becomes almost impossible to assess the observations and the findings based on them. The discussion of shadowing as a research method and its associated merits and pitfalls also reveals another desideratum: We could only find such a discussion in one-third of the studies. These discussions are connected to aspects already known in the literature (see the first sections of this contribution); we were unable to identify significant new aspects. Even less discussion was found in the context of the ethical aspects of shadowing. Just one-third of the studies contained references to these aspects. Although there are some studies in which the authors consider ethical issues, nearly half refer mainly to the research standards of their institutions, in some cases without any further explanations.

For future research, it therefore seems important to overcome the gap between the use of the method and its (lacking) methodological elaboration. Based on our findings, we see the following implications for future research:

- (1) First, it is relevant that researchers provide reference points when using shadowing and at least define it for their own work. Otherwise, there is a danger that “shadowing” will become an umbrella term that sounds attractive, but ultimately remains under-defined and empty of meaning. To prevent this, the methodological discussion, such as that found in Bøe et al. (2017), must be advanced by also reflecting on the research paradigm and conceptualizations. Here, it could also be useful to look at research work from other disciplines, such as management research, and take an integrative approach to define shadowing. However, it is not only researchers who should devote themselves to a (more thorough) conceptual underpinning when planning and implementing their own research. Journal reviewers and editors can also play an important role and work toward ensuring that a more detailed definition of shadowing and more precise description of the methodological procedure are offered in future studies. This would not only increase the transparency and quality of individual studies, but also advance the methodological discourse around shadowing.
- (2) During the methodological reappraisal, a discussion of related or included methods and their parameters should also take place. If observations and their parameters remain undefined and unreflected, this raises questions about the role of the researchers and degree of participation and interaction, the structuring of the observation, the definition of the field of observation, or even the data collection in the context of the observation. In this context, it would also make sense to include a discussion on the merits and pitfalls of shadowing. For example, the growing use of the method could be used on a meta-level to find solutions to the challenges mentioned, such as dealing with observation effects or large amounts of data. Ultimately, this could also contribute to a better preparation of researchers before implementing shadowing and thus to high-quality methodological training.
- (3) Furthermore, the marginal consideration of ethical aspects in the analyzed studies appears insufficient due to the immersive nature of shadowing as a research method. As became clear in the presentation of the results, shadowing as a research method raises various ethical questions that affect different levels: On the one hand, effects on the research subjects as well as the researchers themselves, their relationship and the associated power dynamics must be considered. On the other hand, effects on the environment, the handling of privileged, possibly unintentionally provided information and situations resulting from “conspicuous invisibility” (Quinlan, 2008, p. 1491) should be discussed. In future research, these aspects should not only be considered and critically discussed “on the fly” while planning and conducting shadowing, but a detailed examination of such ethical aspects with the inclusion of other disciplines, such as philosophy, would seem worthwhile.
- (4) Finally, we would like to point out the possibility of using shadowing in a variety of ways. As shown, most authors use shadowing to examine the practices of school leaders, but the method is also suitable for other purposes. Due to the special type of observation, the context of actions, (changing) dynamics, power phenomena, networks of relationships and much more can be revealed in everyday situations. These diverse possibilities could be valuable for future research

and enrich study designs in many ways. To utilize this diverse potential of shadowing, it is important to be aware of it and to find a creative approach to shadowing when planning research work.

What have we learned *anew*? In summary, we find that, despite a wave of new shadowing-type studies, many of the previously identified issues remain unsolved. From our point of view, there is (still) a great need for critical methodological discussions and reflections on shadowing and similar methods. The ongoing interest in these methods should be coupled with a (methodological) development in future research. To unleash the potential of shadowing studies, researchers need to be precise in their definitions and theoretical foundation, as well as rigorous and transparent in its use.

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## Appendix

**Table A1.** Aims of the analyzed studies using shadowing. It should be noted that some studies fit into multiple categories and therefore appear multiple times.

### Conducting research on leadership practices.

- Bhengu, T. T., Mchunu, B. S., & Bayeni, S. D. (2020). Growing Our Own Timber! Lived Experiences of Five School Principals in Using a Systems Thinking Approach for School Development. *SAGE Open*, 10(1), 2158244020902061. <https://doi.org/10.1177/2158244020902061>
- Bøe, M., Heikka, J., Kettukangas, T., & Hognestad, K. (2022). Pedagogical leadership in activities with children – A shadowing study of early childhood teachers in Norway and Finland. *Teaching and Teacher Education*, 117, 103787. <https://doi.org/10.1016/j.tate.2022.103787>
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- Hughes, M. (2019). Pedagogical leadership: A case study of the educational leader in an early childhood setting in Australia [Dissertation, Victoria University]. <https://vuir.vu.edu.au/40540/>
- Kazemi, E., Resnick, A. F., & Gibbons, L. (2022). Principal Leadership for School-Wide Transformation of Elementary Mathematics Teaching: *Why the Principal's Conception of Teacher Learning Matters*. *American Educational Research Journal*, 59(6), 1051–1089. <https://doi.org/10.3102/00028312221130706>
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#### Finding out about the lived experiences of school principals.

- Bayeni, S. D., & Bhengu, T. T. (2018). Complexities and Contradictions in Policy Implementation: Lived Experiences of Three School Principals in South Africa. *SAGE Open*, 8(3), 2158244018792037. <https://doi.org/10.1177/2158244018792037>
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- Brennan, J., & Mac Ruairc, G. (2019). Different worlds: The cadences of context, exploring the emotional terrain of school principals' practice in schools in challenging circumstances. *Educational Management Administration & Leadership*, 47(1), 129–146. <https://doi.org/10.1177/1741143217725320>
- Hughes, M. (2019). Pedagogical leadership: A case study of the educational leader in an early childhood setting in Australia [Dissertation, Victoria University]. <https://vuir.vu.edu.au/40540/>
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#### Exploring the beliefs, opinions, and/or identity of principals.

- Clayton, J. K., & LaBatt, A. (2019). Balancing the Role of the Principalship: Creating and Sustaining Equity and Excellence. *Education Leadership Review*, 20(1), 69–86.
- Kurland, H. (2019). School leadership that leads to a climate of care. *International Journal of Leadership in Education*, 22(6), 706–730. <https://doi.org/10.1080/13603124.2018.1529818>
- Lee, Y. (2017). Motivation, Preparation, and Practice of New Headteachers in Seoul, the Republic of Korea: A Qualitative Study of Secondary School Leadership [PhD Thesis]. University of Warwick. <http://webcat.warwick.ac.uk/record=b3141562~S15>
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#### Examining how principals support their students' postsecondary preparation.

- Duncheon, J. C., & DeMatthews, D. E. (2018). Early College High School Principals: Preparing Historically Underrepresented Students for College Success. *NASSP Bulletin*, 102(4), 269–290. <https://doi.org/10.1177/0192636518812703>

<b>Exploring influences of professional learning of principals.</b>
<ul style="list-style-type: none"> <li>● Jerdborg, S. (2021). Participation in the Swedish national principal training programme: How does it intertwine with principals' practice? <i>Educational Management Administration &amp; Leadership</i>, 51(4), 932–948. <a href="https://doi.org/10.1177/1741143221998711">https://doi.org/10.1177/1741143221998711</a></li> <li>● Midha, G. (2020). Principal Meetings: Pressure Mechanisms That Shape Professional Knowledge. <i>Journal of Higher Education Theory and Practice</i>, 20(7), Article 7. <a href="https://doi.org/10.33423/jhetp.v20i7.3154">https://doi.org/10.33423/jhetp.v20i7.3154</a></li> <li>● Midha, G. (2022). Meetings: School leadership infrastructure that creates sense. <i>International Journal of Leadership in Education</i>, 0(0), 1–26. <a href="https://doi.org/10.1080/13603124.2022.2076287">https://doi.org/10.1080/13603124.2022.2076287</a></li> </ul>
<b>Examining emotional states of principals and how they cope with them.</b>
<ul style="list-style-type: none"> <li>● Mahfouz, J. (2020). Principals and stress: Few coping strategies for abundant stressors. <i>Educational Management Administration &amp; Leadership</i>, 48(3), 440–458. <a href="https://doi.org/10.1177/1741143218817562">https://doi.org/10.1177/1741143218817562</a></li> <li>● Mahfouz, J., King, K., &amp; James, L. D. (2021). Lessons from the Storm: Emotions, Meaning-Making &amp; Leadership During Transition. <i>The Asia-Pacific Education Researcher</i>, 30(4), 339–347. <a href="https://doi.org/10.1007/s40299-021-00574-w">https://doi.org/10.1007/s40299-021-00574-w</a></li> </ul>
<b>Discussing shadowing as a methodology for researching educational leaders and leadership.</b>
<ul style="list-style-type: none"> <li>● Bøe, M., Hognestad, K., &amp; Waniganayake, M. (2017). Qualitative shadowing as a research methodology for exploring early childhood leadership in practice. <i>Educational Management Administration &amp; Leadership</i>, 45(4), 605–620. <a href="https://doi.org/10.1177/17411432166636116">https://doi.org/10.1177/17411432166636116</a></li> <li>● Hughes, M., Kilderry, A., &amp; Keamy, R. K. (2023). Shadowing methodology and the role of the Educational Leader. <i>Early Years</i>, 43(4–5), 1131–1144. <a href="https://doi.org/10.1080/09575146.2022.2084512">https://doi.org/10.1080/09575146.2022.2084512</a></li> <li>● Pollock, K., &amp; Hauseman, D. C. (2017). Observational Research on the Work of School Principals: To Time or Not to Time. In L. Ling &amp; P. Ling (Eds.), <i>Methods and Paradigms in Education Research</i> (pp. 88–107). IGI Global. <a href="https://doi.org/10.4018/978-1-5225-1738-2.ch006">https://doi.org/10.4018/978-1-5225-1738-2.ch006</a></li> </ul>

**Table A2.** Time spent on shadowing/structured observation in the analyzed studies.

Hours observed/ Observation sessions	Studies	Details/Comments
2 days (probably)	van den Boom-Muilenburg et al. (2022)	van den Boom-Muilenburg et al. (2022) one day per school (2 schools)
2 days	van Vooren (2018)	van Vooren (2018): half a day per principal (4 principals)
3 sessions	Kurland (2019)	Noman et al. (2018): Plus other observations of school life
3 different days and times for a few hours	Noman et al. (2018)	
3 consecutive days	Fabry et al. (2022)	
4 days	Brennan & MacRuairc (2019)Gawlik (2018a, 2018b)	Brennan & MacRuairc (2019): Probably one day per principal (4 principals) Gawlik (2018a, 2018b): one day per principal (4 principals)
18 hours	Mkhize (2017)	Three hours per principal (6 principals)
20 hours/5 half days in 5 weeks	Hughes (2019); Hughes et al. (2023)	Hughes et al. (2023) is based on the findings of Hughes (2019), thus same methods
30 hours	Kazemi et al. (2022)	Unclear how many hours of shadowing out of 30 hours total observation time
35 hours	Cherbow et al. (2020)	
6 days	Bayeni and Bhengu (2018) Leu Bonanno (2023)	Bayeni and Bhengu (2018), p. 15 hours on average (≈ 2 days) per principal (3 principals) ≈ 6 days Leu Bonanno (2023), p. 47 hours across two principals ≈ 6 days
One week per principal	Bøe et al. (2017) De Lisle et al. (2020) Kouali (2017)	De Lisle et al. (2020): Across multiple visits
Several full or half-day long sessions	Rigby et al. (2021)	
8 sessions	Wong (2019)	Wong (2019), p. 4 principals, each was shadowed twice, but unclear for how long
8 days (one day/ principal)	Midha (2020, 2022)	Midha (2020, 2022): Shadowing only to identify sample, not in actual study
9 days	Heikka, Suhonen, et al. (2022)	3 leaders, each shadowed for 3 days
12 days	Gómez-Hurtado et al. (2020)	Two days per month for each center
13 days	Bøe et al. (2022) Opazo et al. (2023a, 2023b).	Opazo et al. (2023a): no information, but seems to be based on the same study (same data collection period) as Opazo et al. (2023b): one day per principal (13 principals)
14 days	Jerdborg (2021)	Jerdborg (2021): One day per principal (14 principals)
Two weeks	Noor and Nawab (2022)	Noor and Nawab (2022): one week per principal (two principals)
15 days	Pollock and Hauseman (2017)	

(Continued)

**Table A2.** (Continued).

Hours observed/ Observation sessions	Studies	Details/Comments
80 hours	Toure and Dorsey (2018) Walls (2023)	Toure and Dorsey (2018): Each principal (3 in total) was shadowed weekly, but unclear for how long Walls (2023): 80 hours at each school. How many hours were spent shadowing remains unclear
152 hours	Kim and Weiner (2022)	Each principal was shadowed for 6–7 days, 6–8 hours per visit (3 principals)
20 days	Lee (2017)	One day per school (20 schools/headteachers in total)
21 days	Mahfouz (2018, 2020, 2021)	All articles report on the same study
30 days	Nicolosi (2020)	Five days/principal (six principals)
123 hours of shadowing	Heikka, Kahila, et al. (2022)	Three days per teacher leader (6 teacher leaders)
150 hours of observation	Duncheon and DeMatthews (2018)	
200 hours of observation	Rivera McCutchen (2021)	200 hours in the field, unclear how many of them spent shadowing
80 days	Goldring et al. (2019)	5 days per principal (16 principals). Annual repetition of shadowing (unclear, how often)
Weekly during four months	Clayton and LaBatt (2019)	Unclear for how long the shadowing occurred per visit
760 hours of observation	Honig and Rainey (2019)	
6 months	Netshitangani (2018)	“unbroken period of six months” p. 279 (1 principal)
7 months	Niño (2018)	
No information/unclear	Bezzina et al. (2018); Bhengu et al. (2020); L. J. Gill (2018); MacDonald (2023); Neupane et al. (2022); Tam (2019); Taole (2019)	Neupane et al. (2022): observation “for an extended period” (p. 5)

*Flowchart based on:* Page MJ, McKenzie JE, Bossuyt PM, Boutron I, Hoffmann TC, Mulrow CD, et al. The PRISMA 2020 statement: an updated guideline for reporting systematic reviews. *BMJ* 2021;372:n71. doi: 10.1136/bmj.n71. For more information, visit: <http://www.prisma-statement.org/>.