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# Democratic Values in Evaluation Systems – A Circle That Can Be Squared?

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## Abstract

This paper is concerned with the interlocking of democratic values and evaluation systems. A central issue in evaluation has been adherence to democratic values by speaking truth to power or taking an inclusive approach to evaluands. In parallel with these democratic endeavours, evaluation design has increasingly moved from ad-hoc evaluations toward evaluation systems. The question we raise in this paper is how compatible the democratic endeavours of evaluation are with the rise of evaluation systems as the *modus operandi*. We apply this question to the case of the Swedish school system and its built-in evaluation system: systematic quality work (SQW). In order to explore the research question, school principals were asked to articulate how the democratic mission is visible in their SQW. The results indicate that prominent managing logics at different school levels seem to affect how well democratic values are incorporated into the SQW, highlighting the need to address the institutional and governing setting of evaluation systems in combination with the actors' roles and decisions in accordance with the democratic evaluation literature.

## Introduction

Evaluation has an inherent valuing aspect. Planning, participating in, conducting, and reporting on an evaluation is therefore always infused with questions of power. Applying methods, deciding on who is to be involved, allocating resources, and deciding on what should be evaluated are all value-laden questions that affect the outcomes of the evaluation. This paper is concerned with the interlocking of democratic values and evaluation systems. Democratic evaluation has been a recurring theme in the evaluation literature, from the introduction of the concept by MacDonald (1974) to the growth of different approaches such as responsive evaluation (Stake 2003; Stake 1976) participatory evaluation (Chouinard 2013; McTaggart 1989, 1991), deliberative democratic evaluation (House and Howe 2000; Howe and House 1999), communicative evaluation (Ryan 2004), progressive evaluation (Picciotto 2015), and dialogic responsive evaluation (Abma, Leyerzapf and Landeweer 2016). The shared aim among these approaches is that evaluation should deal with its inherent power relations and asymmetries. The process of advocating and ensuring participation and influence from stakeholders or central actors is often left to the individual evaluator. This singular focus on the evaluator has been criticised for not taking contextual, social, and organisational aspects of evaluations into account. Focusing on the context of evaluation becomes even more important with the rise of evaluation systems. The focus on the evaluator's

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role as prescribed in democratic evaluation consequently needs to be viewed in relation to an organisational or institutional setting, as well as the governing context and the functioning of the evaluation system in that context.

Given this representation, potential dilemmas may emerge between the focus on the sole evaluator in democratic evaluation and the rise of evaluation systems. First, evaluation systems are institutional policy arrangements (Liverani and Lundgren 2007), placing the focus on the organisational level rather than the sole evaluator. Second, there is a prescriptive element to evaluation systems (Rist and Stame 2006), which can limit actors' agency and impose top-down pressure on how and when evaluative activities should be conducted. In addition, research on the consequences of evaluation systems has shown that ritual (Dahler-Larsen 2011) and legitimising evaluation use (Hanberger 2011) may increase when evaluation systems are implemented.

In the light of this, we seek to explore democratic values in relation to an evaluation system. The evaluation system in focus is the systematic quality work (SQW) of the Swedish education system. SQW can be described as an evaluation system in which every school and preschool is obliged by school law to follow up on and evaluate the school's goal attainment in ameliorating problems and improving and developing school performance. This procedure is sometimes called quality assurance in other contexts (cf. Andersen, Dahler-Larsen and Pedersen 2009).

The national guidelines for SQW are based on ideals derived from what could be termed democratic evaluation through the emphasis on stakeholder involvement and participatory aspects (NAE 2012). However, it has an inbuilt controlling dimension (further elaborated below). At the heart of SQW are the school principals, who are central actors in implementing SQW at the school level. How they, and other actors, interpret and enact the law in relation to schools and the national guidelines regarding SQW is decisive for its results (Lundström 2015; see Ball et al. 2012). The aim of this paper is to explore how principals articulate and understand their work on SQW in relation to the democratic mission, and to discuss how this can be understood in relation to the forms and functioning of evaluation systems.

The rest of the paper is organised as follows: The next section briefly introduces the governing setting of the evaluation system, how it was put in place to support the changing governance of the education system towards decentralisation, with the local level taking a greater responsibility to evaluate and develop school praxis. At the same time, the shift to management by objectives and results (MBOR) inspired by New Public Management (NPM) with its focus on efficiency and results also permeates the SQW, indicating control rather than development as the main purpose of SQW. The dual function of the SQW evaluation system to both support organisational development and function as an accountability tool supporting control in the governing setting is an important aspect highlighted in the contextual background for the SQW. Another important aspect of the contextual background is the democratically prescribed participatory ideals articulated in the national guidelines for SQW, which is also important in regard to the schools' work and the leadership of the principals as stated in the Education Act. Previous research and theoretical underpinnings on evaluation and participation are subsequently, followed by a

thematic presentation of the results and analysis, focusing on aspects of participation in the SQW. Finally, the findings and their implications are addressed in a concluding discussion.

## Governing, Evaluation, and the Democratic Mission in the Swedish Education System

The Swedish school system is mainly a decentralised school system, where the government and national authorities set up objectives and organise monitoring and evaluation of the objectives. School organisers, whether municipal or independent (companies/associations, etc.) are responsible to run the school according to the Education act (SFS 2010:800), as well as report on the process and outcome. This mode of governance is often referred to as management by objectives and results (MBOR) and is based on the assumption that an agency or organisation becomes more effective when managed by explicit government objectives (Pollitt 2013). One central aspect of the MBOR governing mode is continuous monitoring and evaluation, promoting enhanced data production and reporting (Larsson and Hanberger 2016). It is often promoted from higher authorities to control processes and outcomes, and thus, according to some critics, shows inconsistencies with long-term commitments and decentralisation (Brunsson 2002). Evaluation of different forms is thus a central part of the governing of the education system. More than 30 different monitoring and evaluation systems are set up to appraise schools (Lindgren, Hanberger and Lundström 2016), from international evaluations such as PISA (Hanberger 2011; Ringarp 2016) to numerous national follow-ups and evaluations (Benerdal 2019) and local initiatives, as well as nationally prescribed evaluation systems such as the SQW, interpreted and created at the local level.

### The Systematic Quality Work

In this section the development of the SQW and the intentions is put forward to give a contextual understanding of the evaluation system in focus of the paper. The SQW found its way into the Swedish school system through the increasing influx of ideas from new public management (NPM), MBOR, and by extension the decentralisation of the Swedish school system (Lundström 2015). In the early 1990s, the Swedish school system was heavily reformed. Municipalities and independent actors were given more independence in how to operate individual schools. As the state abdicated large parts of school governing, over time, the school system was put under heavier evaluation protocols from the national level, more specifically by the government's introduction of quality assessment in the school system in 1997 (SFS 1997:702). This entailed that annual quality reports were to be conducted by all schools, public as well as independent. The ambition was to ensure that the schools complied with the law and to be able to compare schools with each other. This is also in line with an international trend of a "quality turn" (Segerholm 2012; Bergh 2010; see also Nytell 2006).

To further pin down what these quality assessments and reports should entail, quality work was put under the label SQW that included general guidelines introduced by the National Agency for Education (NAE 2012). SQW, as it stands today, is regulated in the fourth chapter, called quality and influence,

of the Swedish Education act (SFS 2010:800). The democratic mission, primarily referred to in terms of influence and participation in the Education act, is therefore closely connected to the regulation of quality. The description of SQW in the steering documents entails both a control mechanism for the national level and is expected to be carried out in an inclusive and democratic way. Local school actors, in particular principals, are therefore faced with expectations to self-evaluate their own schools, both to meet the expectations of the national level regarding control and to use it as a way to promote the school's own development work.

The overall idea behind SQW is that it should help with achievement of the national education goals (NAE 2012) through systematic and continuous assessments and evaluations of activities in the schools, thereby identifying areas of improvement. It is thereby intrinsically connected to the underpinnings of MBOR. Another important aspect is that all actors in the schools (teachers, students, parents, etc.) should be involved in SQW, which highlights a participatory foundation (SFS 2010:800). This underscores its close relationship with social processes. At the centre of SQW is judgement making, and the processes are, by definition, about assessment and judgement, and therefore heavily laden with values (Howe and House 1999) that need to be handled, which is the responsibility of the principal at the school level.

### The Principals' Role

The school organisers (which can be municipalities, the state, or independent actors) have the overall responsibility to organise and carry out education in accordance with the curriculum (SFS 2010:800). In the national steering documents, it is clearly stated that SQW should be carried out by both school organisers and principals. The principal is not only responsible for crucial decisions such as what material to collect and how to collect it, but also has a high degree of independence when it comes to allocating funds inside the school. The autonomy of the principal in relation to the organiser (municipality or independent actor) of course varies between schools, but generally, principals have a relatively large degree of autonomy to organise SQW and allocate funds within the school. This emanates from the shift toward MBOR in the 1990s, when principals' role became even more stressed in terms of accountability for achieving objectives and results, which was further reinforced in the Education act introduced in 2010 (SFS 2010:800). The principals in the Swedish school system today are, consequently, more autonomous than before but also held accountable for goal achievement and managing the budget to a larger extent. As accountability holders, principals hence experience a higher degree of expectations from actors inside and outside the school, such as teachers, students, parents, school organisers, and the national government (Leo 2015). They therefore must act, and react, in relation to a variety of different pressures, from both above and below, and in relation to various requirements that need to be addressed.

### The Democratic Mission in the Swedish School System

In Sweden, schools' important role in developing students' democratic values and competencies is emphasised. In fact, the entire Swedish school system since

the post-war era has been underlined by democratic ideals, not least to protect against the potential rise of totalitarian affinities in society (Fjellström 2004). Since the 1990s, interest in education and democratic citizenship from both educators and politicians has increased (Biesta and Lawy 2006). This interest in democratic education has partly been driven by emerging democracies. Nevertheless, questions about education and democratic citizenship have also been brought to the fore in many established democracies. The reason for this surge can partly be attributed to electoral success of far-right, authoritarian parties in numerous democracies in Europe and around the world (Mudde 2019).

In Sweden, the educational mission is prescribed as democratic, whereas many other countries generally refer to civic or citizenship education (Hakvoort and Olsson 2014). This democratic mission is formulated in the Education act as fundamental (SFS 2010:800):

*“The school system rests on a democratic basis. The school’s mission is to promote learning where the individual is stimulated to acquire and develop knowledge and values.”*

The mission includes promotion of knowledge about the structures and processes of political democracy, but also to lay the foundation for active societal participation, as stated in the Education act:

*“The education shall promote comprehensive contacts and social community and provide students with a good foundation for active participation in society” (SFS 2010:800, kap. 10, 2 §).*

Hence, the democratic mission is often described as bisectional for schools in Sweden (Almgren 2006). The democratic mission should include both education about democracy and use of democratic processes in the schools.

These depictions of how democratic aspects are constructed in Swedish education policy are important since they form and influence principals’ enactments and sense making of democracy. Trujillo et al. (2021) demonstrate how educational leaders (i.e. principals) in the United States and Norway conceptualised democracy differently depending on which democratic and governing regime they were embedded in.

Democracy is an elusive concept that can be conceptualised in numerous ways. One way of understanding different notions of democracy is through its three different types: elite democracy, participatory democracy, and deliberative democracy (Habermas 1996; Eriksson 2007; Hanberger 2006). These normative models of democracy entail different procedural ideals, as well as definitions of what democracy is and the scope of citizen participation. In the elite democratic ideal, participation is limited to citizens electing their representatives, whereas participatory democracy is predicated on the citizens’ opportunity to participate throughout the democratic process. Deliberative democracy, in turn, suggests that the essence of democracy is situated in deliberation, where citizens are open to altering their preferences and views through the course of their interactions (Dryzek 2000). The foundation of democracy thus lies in the forms of participation. Hanberger (2006) argues for an understanding of the function of evaluation in relation to notions of democracy. The democratic orientation of

elitist democratic evaluation is prescribed to be “for the people”, the participatory democratic evaluation as “by the people” and the discursive democratic evaluation as “with the people” (Hanberger 2006: 25-29). In this paper we take an exploratory approach as to how participation and the functioning of the evaluation system of the SQW takes its shape and form in perceptions of principals. They are all in ‘the same’ governing context (the Swedish education system) but given the local and institutional context they could be adhering to different ideals and perceptions of both democracy and the role of SQW in their setting.

## Arranging for Democratic Aspects in Evaluation Systems

### Evaluation Systems

In recent years, evaluation researchers have increasingly focused on evaluation systems. The development of evaluation systems has been described in terms of how such systems have become institutionalised in the public and private sector in the last decades, either as a complement to or to replace stand-alone evaluations. One way of describing this change comes from Rist and Stame (2006), who suggested that a stream is a feasible metaphor for understanding the development toward evaluation systems: The typical single-study evaluation gives way to a continuous flow of information that resembles the structure of a stream. The reasons for this qualitative change in the way of undertaking evaluation have been suggested to come from different directions. One explanation comes from a logic-rational perspective. Single studies can often be perceived as uninformative if they are not supported by other findings. Performing ad hoc studies can also increase the risk of administration amnesia (Rist and Stame 2006). That is, the same questions and the same answers are repeated in a loop, and no real progress is made. Another explanation for the increasing number of evaluation systems is demand. New information needs from organisations and institutions call for a steady flow of information to produce timely performance information.

The emergence of evaluation systems is closely connected to modes of governance such as NPM and MBOR (Larsson and Hanberger 2016; Vedung 2010). In addition, the general trend of a “knowledge society” that infuses more knowledge into organisations plays an important role in the development of evaluation systems (Dahler-Larsen 2011). Using Blalock (1999) one could understand the rise of evaluation system as the coming together or conflict between two movements; performance management and evaluation research. Performance management and evaluation research share the purpose of improving government policies and programmes. However, they entail significant differences. Performance management is mainly a planning and managerial tool while evaluation research is an applied research tool emanating from social science research. This implies that evaluation systems can be designed and function in different ways depending on the context and the relative influence of evaluation research in performance management systems. Hence, evaluation systems can take different forms. It should also be noted that what we call evaluation system in this article is sometimes called something else, such as the routinisation or institutionalisation of evaluation or even evaluation

machines (Power 1999; Dahler-Larsen 2011). We include these strands of research in our notion of evaluation systems even though they may not use the term evaluation system.

Leeuw and Furubo (2008) introduced four criteria for defining evaluation systems: a shared epistemological perspective, some degree of institutional organisation, production of evaluation knowledge that is recurring or permanent, and directed toward intended users. Other definitions have widened the focus to include the response aspect of evaluation systems (Hanberger 2011) and how institutions and organisations establish routines for dealing with recurring streams of evaluation knowledge (Hanberger 2016). Following Liverani and Lundgren (2007, p. 241), we understand an evaluation system as “the procedural, institutional and policy arrangements shaping the evaluation function and its relationship to its internal and external environment”.

Evaluation systems have been organised in numerous ways with different outcomes (Kusek and Rist 2004; Dahler-Larsen 2006; Hanberger 2011). One important finding is that while evaluation systems intend to address the shortcomings of ad hoc evaluations, they also seem to produce unintended or constitutive effects. For example, a comparison between two different evaluation systems with different epistemological perspectives showed that they had different outcomes, underlining that the construction of evaluation systems must be viewed through the lens of their social and organisational context (Dahler-Larsen 2006).

Two implications of the increased implementation of evaluation system in the Swedish school system is that evaluative activities take up more time and energy than ever before and that evaluative activities are becoming more technical and routinised (Segerholm, 2007). Using the lens of Blalock (1999) the evaluation activities in the Swedish school system seemed to be more infused with ideas from the performance management movement than from the evaluation research movement. Even though, the implications and functions of evaluation system have been addressed in public administration in general and in the school system in particular research on democratic evaluation and its relationship with evaluation systems has not explicitly been addressed in the literature.

Taken together, evaluation systems may produce different outcomes depending on how they are set up and prescribed at the national level or at the centre of an organisation, as well as how they are interpreted and organised by local or peripheral actors. Following the line of previous research, this would indicate that evaluation systems also affect power relations and create different spaces for action and participation regarding who is invited to participate and in what ways. This has, however, not yet been a focus of research on evaluation systems. In the literature on democratic evaluation, however, several approaches have evolved focusing on these aspects of evaluation.

## Democratic Evaluation

As described in the introduction, several approaches adhering to democratic ideals have been put forward in the evaluation literature. Practitioners as well as theorists have anchored their work in a commitment to democratic social justice,



equality, or empowerment almost from the beginning of the contemporary history of programme evaluation (Greene 2006, p. 118). MacDonald's (1974) argument of democratic evaluation as a response to the dominance of what he described as bureaucratic and autocratic evaluation also highlights the fact that evaluators affect power relations.

Several evaluators and theorists have argued for the need to consider evaluators' role in affecting or changing the social context in which the evaluation takes place. In many of the approaches arguing for a democratic evaluation or a democratic approach to evaluation, evaluation is described as having a certain function in a democracy; the role of the evaluator is elaborated on, as well as the role of participants: Who is included and what are their roles? These aspects are also in line with Greene's (2006) "macro politics and micro relationships of evaluation." Whereas some approaches focus on the realisation of democracy through the participatory aspects of evaluation by including different legitimate sources of knowledge and empowerment of marginalised groups by advocating for participatory evaluation (Chouinard 2013; McTaggart 1989, 1991), others have focused on the forms by which participants take part in the evaluation, such as House and Howe with their Deliberative Democratic Evaluation (2000, 1999). Although the literature acknowledges the macro politics of evaluation, much of the focus has been placed on the evaluator and how s/he can make sure that evaluations adhere to democratic values such as social justice, equity, and empowerment. The question is how these dynamics change when evaluations are organised in systems rather than ad hoc. In this paper we address this question in an explorative manner using SQW as the case.

To analyse how democratic aspects are considered in the evaluation system, we apply Mansfield, Welton and Halx (2018) five stages of participation (cf. Keisu and Ahlström 2020). These stages were developed with student participation in mind, but they are largely applicable to school actors in general. The lowest stage on the participation continuum describes students as data sources, that is, using student results or student responses on surveys to include them. The second stage elaborates on how student opinions can be heard in different ways but still leaves out students as active participants in democratic work. The third stage describes how students can be active participants through, for example, collaboration with adults. At the fourth stage, participation increases, and students are described as researchers. At this stage, students can take on their own studies, make their own analyses, and have them included in the school's SQW. The final stage visualises participation that is still unknown and therefore includes a potential that can only be realised through continuous deliberation and participation. These stages of participation are directed toward students and may therefore not be directly applicable to all school actors, given they are not in the school on a daily basis, but they illustrate how participation can vary both in quality and in quantity.

As evident in the rendering above, the evaluator's role is central to democratic evaluation. Additionally, as mentioned, principals are designated as important actors for the functioning of SQW according to the Education act (SFS 2010:800). Undertaking and implementing the evaluation system in the form of SQW, as well as involving stakeholders, is the principal's responsibility. At the same time, the evaluation taking place (SQW) should take the form of an

evaluation system in the education system. SQW is an institutional policy arrangement steered from the national level through the Education act and recommendations from the NAE with consequences at the local level (cf. Liverani and Lundgren 2007). This puts the focus on the institutional arrangement and the governing setting rather than the sole evaluator. How principals handle different pressures and manage the evaluation system in relation to the democratic mission placed on all schools is explored in this paper. This role can in some sense be described as that of an “arranger” or “enactor” regarding how SQW is supposed to function in schools. How principals interpret, and if so, how they account for, democratic aspects in SQW are thus of our concern. As presented earlier, the evaluation system is supposed to function for local development work, but also as an accountability tool in reporting upwards, hence focusing on control. This is what we term the dual functioning of the SQW evaluation system. Drawing on Hanberger (2006) the principals could be reasoning in relation to different notions of democracy as to whether they are arguing for participation for, by or with the participants and to which extent they are including different participants and further, how they describe participation should take place.

## Method and Material

The material used in this paper came from a questionnaire that was distributed by email in the spring of 2020 to 104 principals who were at the time participating in the national school leadership training programme. The questionnaire entailed background questions on, for example, gender and type of school the school leaders worked in, as well as three open-ended questions regarding the democratic mission and SQW. For example, they were asked what they consider to be the biggest challenges in fulfilling the democratic mission in their school/preschool and how they perceive the democratic mission is made visible in their SQW. After two reminders, 42 principals (40%) had answered the questionnaire. The principals who answered the questionnaire represent all different school levels, from preschool (36%) to elementary school (52%), upper secondary school (10%), and adult education (2%). Seven of them worked at an independent school and 35 at a public school organised by the municipality. Most of them were women (88%). These variations were not controlled for in relation to the overall population of principals participating in the school leadership training programme, because the aim was not to get a representative selection of Swedish school principals but rather to get a variation of school principals to reflect on their own practice in relation to the democratic mission and SQW. However, the gender distribution, for example, does mirror the fact that women principals are an overall majority in the leadership training programme.

We used the background variable of school type in our analysis because this seemed to have bearing on the analysis; hence, in the presentation and use of quotes, we chose to make visible the different principals' statements by assigning each principal an individual number (P1-42) and a letter combination indicating the type of school: preschool (PS), elementary school (ES), upper secondary school (USS), and adult education (AE).

When the questionnaire was distributed, it was stated that participation was voluntary, and confidentiality was ensured through the programme used for delivery and collection of the answers. Their replies varied between 2 and 651 words. The most concise answers came from three principals who replied that they could not state how democratic values were visible in their SQW. To analyse the material, a content analysis approach was applied. Content analysis is one of the several qualitative methods available for analysing data and interpreting its meaning (Elo and Kyngäs 2008). Hsieh and Shannon (2005) differentiate between three distinct approaches: conventional, directed, and summative. This paper employs conventional content analysis, which sets out to describe a phenomenon, in this case principals' experiences of how they enact democratic values in SQW. Given the nature of the studied phenomena and the explorative aim the coding process was inductive (Mayring 2000), putting the data at the forefront and creating categories from the data (Hsieh and Shannon 2005). This allowed the different statements and the principals' understandings to guide the process rather than theoretically derived categories.

The thematic analysis was conducted in two parts. First, both researchers coded the material independently into themes. This coding process was done inductively without a prior discussion between the researchers. After that, deliberation took place over the respective themes, resulting in three themes. After this, a second coding took place by both researchers individually. This was done to ensure the consistency of the themes as well as our interpretations of the principals' statements.

The choice to use a questionnaire with open questions was made for three primary reasons: to make it possible for the principals themselves to choose when to answer the questions, to allow them to express themselves in their own words, and to collect data over a geographically larger area. However, the questionnaire has some drawbacks, with which we were well familiar, such as difficulties for the respondents to answer the questions and us not being able to explain our thoughts, as well as missing opportunities for follow-up questions.

## The Democratic Mission in the SQW According to the Principals

The principals gave very different answers regarding how they perceive that the democratic mission is made visible in their SQW. In the first step of categorization, three different themes emerged: methods, participation and temporality. The majority of the principals described different aspects of SQW methods, for example, what kind of data is collected, which is in line with the first stage of participation (Mansfield, Welton and Halx 2018). Another large group of replies was categorised according to who is participating or asked to participate in the work, for example, what kind of stakeholders were mentioned. Furthermore, some of the principals mentioned when it is done, bringing a temporal dimension into the reply. The temporal dimension was, for example, articulated as:

*"Democracy, equality and diversity is a recurring theme during a period of the school year" (P9, ES).*

Finally, some of the principals stated that they could not answer the question, or that it had not (yet) been developed at their school. As one of the principals articulated it:

*“This is an area for improvement that we are working on”  
(P3, PS).*

Some statements indicated uncertainty, evident for example in this principal’s reasoning:

*“Doubtful if it does” (P32, ES).*

This indicates that this is a difficult area of concern or a difficult question to answer in questionnaire form. However, most of the principals tried to answer the question, and in the following sections, the principals’ statements and reasonings are presented under two headings; the “who” in participation captures who participates and the “how” captures methods and temporality in relation to SQW.

### The “Who” in Participation

This section focuses on principals’ reasoning about specific actors or groups. Some of the principals’ replies indicate a well-thought-out and comprehensive strategy for whom to include in the SQW. These principals mentioned “the whole school” or “participation on all levels,” for example. One principal stated the following:

*“In the systematic quality work, all actors are represented - students, guardians, staff, school leaders. Analyses are made based on each actor’s participation and compiled into a whole” (P1, ES).*

The above statement shows how the different parts are combined into one whole. Another example is a principal who mentioned many representatives of actors:

*“Participation of all levels, student councils, parent councils, work teams, subject groups, trade unions, student health and school management. The report of our SQW takes place for the chair of the committee, who takes it with him before future decisions” (P7, ES).*

Both of these quotes indicate how the democratic mission is interpreted in the form of participation by many different actors. The inclusion of many perspectives is a highly relevant aspect for the principals. However, most of the principals did not focus on participation from many different groups or actors but rather pointed out one or a few actors in their replies. These actors were often mentioned in statements about how they gather or disseminate data for SQW. One particular group stands out as the most frequently mentioned: children/students (see Table 1 below). They were mentioned in different ways. In most replies, they were thought of as central actors, as in “the students” or “the children,” but some principals mentioned particular groups of students, such as student council (elevråd), the school sport association (Skol-IF), or student representative forums.

School staff is another frequently mentioned actor. Staff members were often portrayed as central actors in relation to how the democratic mission is realised at the school and as performers and informants in relation to SQW. One principal exemplified both of these aspects in the following quote:

*“Work that is documented, evaluated, followed up, improved. Head teacher who pursues the issue of student influence primarily in terms of influence over teaching. We see that students are stimulated to be able to influence that part. /.../ The democratic mission is made visible in our plans and policies that all staff and everyone must know, understand, follow and be given the opportunity to influence and develop” (P 23, USS).*

As evident, the head teacher (förstelärare) has a special mission to ensure students’ influence over teaching, but all the staff members are involved through plans and policies, expected to act in line with and participate in the development of them.

Both children/students and teachers and other school staff are expected to be part of the SQW, as stated in the national guidelines and the Education act (NAE, 2012; SFS 2010:800). Another important group is the parents. Their influence is also put forward in the Education act and curriculum, and they seem to be relevant actors for the principals, even if it is to a lesser extent than staff and children/students. The parents were mentioned in relation to surveys, evaluations, and special parent meetings.

Table 1. Principals’ mentioning of participating actors and frequency.

	Participating actors						
Actor	Children and students	School staff	Particular student group	Parents	School board	Super-intendents	Other
Number of principals mentioning	18	13	7	7	2	2	2

The principals also mentioned managers and other actors above them, such as superintendents and school boards, however, perhaps to a smaller degree than expected given the principals’ responsibilities by order of the school organiser. When mentioned, superintendents and school boards were brought up in the context of enforcing or making sure that SQW is carried out properly. This is especially salient in the following quote from one of the principals:

*“We get direct questions from our school board of how we work with these questions. They want continuous follow-ups” (P16, ES).*

This is one example of how principals understand their SQW primarily as something to report upward. Some of the principals also mentioned other actors, such as the union or the guidance counsellors, as being part of the SQW.

### The “How” in Participation

In reading the principals’ statements, it is evident that for many principals, the democratic mission is associated with influence and participation of different sorts. This is an important aspect of the SQW as stated in the Education act, as previously mentioned; it also has a special section in the curriculum. One principal mentioned that this section constitutes a special part of the SQW:

*“Part 2.3 of the curriculum, the students’ responsibility and influence, has its own part in our systematic quality work. It is based on the annual survey that the students answer during the autumn, but also what the guardians together with their children answer during the development interviews (utvecklingssamtal). Our students are asked by each class having a dialogue meeting with the principal before this part is to be evaluated” (P 31, ES).*

Nevertheless, even though many of the principals do associate the democratic mission with participation or influence, the democratic mission has broader intentions. There also seems to be a large variation in the degree to which participation is at the centre, or rather, the depth of participation. For example, 14 principals used the terms student/children participation in their answers. Some principals seem to have a thoughtful awareness regarding what participation is and how they ensure participation to fulfil the democratic mission in relation to SQW. One principal articulated that it is visible “to a large extent,” and further elaborated:

*“Partly because we constantly have a continuous conversation with our students about these issues. Partly because we constantly evaluate and follow up our work. We, for example, discuss as to how it comes about that there is a difference between girls’ and boys’ grades and what we can do about it. All parts of the school are involved in the work. The guidance counsellors are important, for example, to ensure that everyone knows what and how to apply no matter what background they come from, and so on” (P 20, USS).*

The statement above indicates that everyone has an important part to play in both visualising problems and elaborating on solutions and working toward development in line with the democratic mission. For this principal, the democratic mission permeates the work and is therefore also present in the SQW.

Other examples of this mindset are evident in some of the preschool principals’ replies, where the daily work and routines are based on child interviews and observations and also included in SQW. One principal stated, “Influence, participation, norms and values are continuously evaluated through child interviews and observations and are included in SQW” and exemplified with the questions they use to guide their work, as well as the SQW:

*“How and what have we offered? What learning have we seen? How do we proceed?” (P38, PS).*

There are also examples of principals' reasoning about inclusion and participation as separate from democracy, or maybe not the same as democracy. For example, one principal reasoned the following:

*"Inclusion and participation together with democracy are always the basis for planning and structure. For example, in the pedagogical planning and evaluation, it is made visible to the pedagogues that it must be defined and motivated how and why these issues are built into the work. And it is made visible to the children in the various work processes and visually for the children in the different units" (P 17, PS).*

Another recurring association with the democratic mission in relation to SQW was different plans and policy documents. In their replies, a large group of principals mentioned plans and policy documents as a way to ensure the democratic mission in the SQW process. One example is an elementary school principal, one of the many who related it to the equal treatment plan (likabehandlingsplan):

*"We have a continuous systematic quality work around our equal treatment plan. This is a living document that is discussed, analysed, evaluated and improved with students, teachers and the principal. But we can become much, much better at making our democratic mission visible and follow up on it" (P 11, PS).*

The excerpt also indicates the awareness that the democratic mission could be enhanced in their work. The Swedish Education act asserts that students should have influence and be given the possibility to participate in decision-making during their daily school activities. According to the curriculum, schools should not only give students knowledge about democratic values. In addition, schools must conduct their education in a democratic manner to prepare students to become participants in society (Lgr 11; Lgy 11). However, the replies focusing on policies and plans seem to take a more narrow view. The democratic mission is, in this regard, mostly about knowing of or being familiar with plans and participating in evaluations and further development of them. Turning to the stages of participation (Mansfield, Welton and Halx 2018), most of the principals described the first or, to some extent, the second stage, which include listening to the voices of students and children. Few articulated how children and students collaborate with adults to increase participation.

Another theme regarding "how" are the answers that highlight different data collection methods to inform SQW. Many mentioned surveys and interviews. In addition, observations are used to inform SQW. This suggests that indicators that overly simplify what it is intended to measure are not relied on as a sole metric to evaluate the school's goal achievement and results. Instead, various data collection methods are used. Overemphasising a particular indicator can lead to side effects or constitutive effects where the organisation anticipates how it should conduct itself to perform well given certain standards and indicators (Dahler-Larsen 2011; Hood 1995). No evidence of this was found in our material. At the same time, it is not possible to determine how SQW actually

plays out at the different schools from our material. Rather, we analysed the principals' replies as statements of what was deemed important at that moment, which also enables a discussion of different levels of participation based on their reasoning. One aspect of this is the tense used in the language. In many of the principals' replies focusing on data collection methods, the participants were referred to in passive terms. That is, stakeholders were described as passive actors used as informants rather than active participants in the process of developing the SQW and the process, for example. This indicates that the fourth (and fifth) stage of participation (Mansfield, Welton and Halx 2018), where students or children are described as researchers in their participation, is not prominent.

## Concluding Discussion

The ambition of this article was a combination of theoretically driven curiosity awakened by the changing landscape for evaluation. The implementation of evaluation systems is to a larger degree than previously permeating societal contexts and affecting power relations. This is especially apparent for many officials and employees in the public sector who are both a part of and respond to the structuring of evaluation activities. However, this article was also driven by a concrete situation for one of us as an educator in the school leadership programme, where current principals are participating in the nationally mandated school leadership training programme. Their questions and their difficulty in combining conflicting interests and pressures have thus been an important starting point.

We have explored how principals articulate and understand their work with SQW in relation to the democratic mission. This was based on a questionnaire with open-ended questions. Using a questionnaire made it possible to gather reflections from principals from different geographical regions, as well as being time efficient, but it also had shortcomings. SQW is an important and encompassing process in many schools and for many principals but might be difficult to describe in text. This is probably also the case with the democratic mission. The long timeframe to answer the questionnaire, however, gave the principals time to reflect and return to the questionnaire at their convenience. The longer replies indicate that this occurred. We treated the answers as articulations of what the principals deemed important at that time regarding the democratic mission in relation to SQW, and not comprehensive descriptions of what they are doing in SQW. The fact that several principals stated that they need to develop the democratic aspects of their SQW, or that it is not visible at the moment, shows that even though influence and participation (i.e., democratic aspects) should be central to SQW according to steering documents such as the Education act (SFS 2010:800), this is difficult or under-prioritized in some cases. It is however important to keep in mind that the respondents were not randomly selected, thus, the responses are not to be viewed as representative for all principals in Sweden. For one, most of the principals were at the beginning of their careers. More senior principals may provide different answers to the questions at hand. However, we believe the data still provide valuable insight into the research question due to its exploratory nature.



Our results indicate that the participation of several different actors is important in the SQW, and the mentioned actors largely follow the intentions of the government. Drawing on the principals' replies, SQW seems to be suited for inclusion and participation of many and relevant actors in most schools. However, some indications of problems and troubles in realising the democratic mission through SQW are important to further elaborate on, for example, regarding answers where SQW solely is about reporting upward. This could mean that SQW is not functioning as a way to develop the school's work and strengthen collective learning with the participants but rather as a control mechanism enhancing accountability where evaluation is conducted "for the people" rather than "with the people" (see Hanberger 2006). This is in line with previous research on evaluation systems stating that they exhibit legitimising and constitutive consequences (Hanberger 2011; Dahler-Larsen 2006). It might also relate to the dual purposes inherent in SQW, as a tool for both control and development, which might be difficult to arrange for in the same evaluation system (see e.g. Stockmann and Meyer 2013). It is also following a development of the national evaluation policy indicating a shift over time towards more controlling functions of evaluations (Benerdal 2019). Where evaluation supporting learning and capacity-building on the local level has been replaced by more demands on accountability and local actors such as school leaders, principals, and teachers are expected to both react to external evaluations to a larger extent but also act in relation to a performance accountability culture to a larger degree.

Some principals mentioned participation through specific student groups such as school sport associations or student councils which was an interesting and unexpected finding. In these statements, the democratic mission seemed to only include certain students to learn about democratic forms and democratic leadership. From this perspective, it is possible to question participation in relation to SQW not only from the matter of who participates but also in what ways. Participation is a desirable and central aspect of all democratic ideals. However, how participation is guaranteed and in what way varies. The five stages of participation (Mansfield, Welton and Halx 2018) provide a useful conceptualisation of how participation can be understood. In our results, we mainly found indications of stages one and two. This could be because the higher stages of participation are lacking in the schools, but it could also be that these participation stages mainly occur in relation to activities other than SQW. However, further research into this territory could benefit from more comprehensive data and theoretical underpinnings as how to elaborate on these matters.

How participation was described thus varied among the principals. However, one interesting observation in our material is that preschool principals seem to be on both sides of the spectrum: The majority of those answering that the democratic mission was not prominent in their SQW, or that the link between the democratic mission and SQW needs to be further developed, were preschool principals. At the same time, they were the group of principals that provided the most detailed and expansive answers regarding how the democratic mission is made visible in their SQW.

These findings can be analysed in different ways. One plausible interpretation is that Swedish preschools have aspirational goals and not attainment goals (Håkansson 2016). The preschool principals' connection to the MBOR logic could be appraised as lower in relation to other principals because of the aspirational goals. Less accountability concerning the goal construct (i.e., aspirational goals) could explain the high number of preschool principals who do not, or need to, develop the link between democratic ideals and the SQW. On the other hand, the relative decoupling from the MBOR logic may provide the preschool principals with extended perceived autonomy to direct their efforts toward democratic ideals themselves instead of reaching goal attainment. This would be in line with research on evaluation systems that concluded that goal attainment that involves high stakes is often followed by "gaming" activities such as "teaching to the test." These gaming activities are less likely to surface in a system with lower stakes of goal attainment, such as aspirational goals in Swedish preschools. Moreover, a comparative study between preschools in Sweden and Western Australia showed that the policy context in Sweden provided more room for educators to include the children in learning activities in contrast to Western Australia where the policy setting focused more on ensuring that individual children meet achievement standards (Lee-Hammond and Bjervås 2020).

This also relates to the kind of leadership principals are expected to execute. They are expected to act according to principles emanating from an MBOR logic, as well as principles originating from democratic ideals such as participation and influence through democratic leadership according to the Education act. However, the different logics might be difficult to combine. This reaches its extreme in an evaluation system with dual functions (i.e., both controlling and local development at its core). The tension, to quote Törnsén (2009, p. 2), "between a result-oriented environment and 'communities that distribute power and decision-making'" is put to test in the SQW, as some principals articulated difficulties in arranging or rearranging the SQW in relation to the democratic mission.

Given that there was a difference in responses between principals of different school levels, the institutional arrangements and governing setting are of importance. Evaluation systems, at their core, are institutional arrangements taking place in a specific context. The institutional or organisational aspect of the evaluative activity in a governing setting is thereby put at the front. However, regarding democratic aspects, the literature on evaluation systems is still lagging. Literature on democratic evaluation, on the other hand, flourishes with methods and approaches for how "as an evaluator" one should ideally arrange for evaluation through the inclusion of relevant participants and how to ensure processes are democratic in different ways. This literature thus places significant focus on the acts and choices of the evaluator, at the same time problematising the act of undertaking an evaluation in a power-relational aspect in general. Evaluation systems research urges us to pay attention to the institutional setting, and democratic evaluation directs our attention to democratic ideals and power relations in evaluation. Going forward, these strands of research should approach and inform each other if we wish to be able to arrange, or rather rearrange, for democratic aspects in evaluation systems. Moreover, this study shows that

principals enact and makes sense of evaluation systems very differently given their context. And an important result to further explore is how, and in what ways, the governing setting matters. If the result from this explorative study holds up in a larger comparative study. Another aspect is to approach the issue with a different methodology suited to capture the “enacting part” such as observations and interviews. This, in addition to the fact that we know very little about the social practices that enact, sustain and use evaluation systems and the symbolic and instrumental effects this has in the context of local education provision, these matters needs to be further explored. The aim of this article was to take one step in that direction. As this is not only relevant for evaluation theory, but also for all those professionals held responsible in an MBOR system where demands for monitoring and evaluation are ever present.

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