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Study Review on the Use of the Documentary Method in the Field of Research on and in Schools in English-speaking Scientific Contexts

Abstract

As both a methodology and a method, the Documentary Method represents one way of scientifically analyzing various phenomena in schools. The Documentary Method was originally developed in Germany, and discussions on its further development remain ongoing in the German-speaking scientific community. Simultaneously, the method has also gained recognition and use in English-speaking scientific contexts in recent years, including in the field of research on and in schools. Against this background, the present contribution reveals the results of a study review of the use of the Documentary Method in the field of research on and in schools in English-language literature. In order to yield a better understanding of the results, some key assumptions about the Documentary Method and its use in research on and in schools are additionally presented. The contribution ends with a summary of research desiderata.

Keywords

Documentary Method, research on and in schools, documentary research on and in schools, study review, research in English language

Zusammenfassung

Studienreview zur Verwendung der Dokumentarischen Methode im Bereich der englischsprachigen Schulforschung

Die Dokumentarische Methode stellt sowohl als Methodologie als auch als Methode einen Zugang dar, um verschiedene schulische Phänomene wissenschaftlich zu untersuchen. Die Methode wurde ursprünglich in Deutschland entwickelt und innerhalb der deutschsprachigen Wissenschaftsgemeinde werden fortlaufend Weiterentwicklungen diskutiert. Allerdings lässt sich die Tendenz erkennen, dass die Methode gegenwärtig verstärkt auch in englischsprachigen Wissenschaftskontexten genutzt wird – nicht nur, aber auch

im Bereich der Schulforschung. Vor diesem Hintergrund werden in diesem Beitrag Ergebnisse eines Studienreviews zur Nutzung der Dokumentarischen Methode in englischsprachiger Schulforschung vorgestellt. Um die Ergebnisse besser verstehen zu können, werden zudem einige Kernannahmen der Dokumentarischen Methode und deren Bezüge zur Schulforschung präsentiert. Der Beitrag endet mit einer Darlegung von Forschungsdesideraten.

Schlüsselwörter

Dokumentarische Methode, Schulforschung, Dokumentarische Schulforschung, Studienreview, Englischsprachige Forschung

1 Introduction

In the field of educational science, empirical research on and in schools has become a central topic in the last two decades. For example, when typing the words “school,” “education,” and “research” into the “Education Research Portal” of the “DIPF – Leibniz Institute for Research and Information in Education,” 218,036 hits for literature and references appear, over 98,000 of which represent monographs or edited volumes.¹ Moreover, searching for the words “handbook,” “school,” “education,” and “research” yields over 1,200 results. The most recently published handbooks listed in the database cover a range of topics, such as “research on shifting paradigms of disabilities in the schooling system“ (Maapola-Thobejane & Maguvhe 2022), “research on teachers of color and indigenous teachers” (Gist & Bristol 2022), “research on teacher education – innovations and practices in Asia” (Khine & Liu 2022), “research on lessons learned from transitioning to virtual classrooms during a pandemic” (Thornburg et al. 2021), and “research in middle level education” with a focus on “curriculum, instruction, and assessment” (Stacki et al. 2020).

When it comes to the methods used in this field of research, quantitative methods are well represented. However, a growing number of qualitative approaches are also being used. One such qualitative approach is the Documentary Method, which remains poorly represented in English-language volumes and studies on research on and in schools. In fact, the Documentary Method does not appear at all in any of the handbooks mentioned above. Nevertheless, the Documentary Method is a systematic qualitative research method that allows researchers to analyze diverse data that are relevant for research on and in schools, including transcribed speech (e.g., transcripts of interviews, group discussions) and visual materials (e.g., photographs, video stills). As it is based on Karl Mannheim’s So-

1 The literature search was carried out on 8 September 2022 at <https://www.fachportal-paedagogik.de/en/>.

ciology of Knowledge (e.g. Mannheim 1936) and also takes into account ideas from other sociologists, such as Harold Garfinkel and Pierre Bourdieu, the Documentary Method aims at reconstructing the orientations of social actors – that is, it aims at reconstructing the shared explicit and implicit knowledge of these actors which is based in (different) milieus (e.g., Bohnsack et al. 2010).

However, in some English-language empirical studies, the Documentary Method is used to analyze school-related phenomena. While several of these studies have been written in German by researchers from Germany, Austria and Switzerland, others stem from researchers with different native languages and from other countries around the world (e.g., Brazil, France, Poland, and Turkey) or are the result of collaborations with researchers from German-speaking scientific contexts.²

Compared with other research fields in which the Documentary Method is used (e.g., research on childhood and adolescence, political science), quite a few studies that focus on research on and in schools have been published in English. For example, a list of publications that deal with the Documentary Method clearly demonstrates that documentary research on and in schools forms the largest research field compared with research on youth culture, migration, protest movements, religion, or seniors.³

Against this background, the present article contains a study review of research conducted on and in schools using the Documentary Method. First, main assumptions about the Documentary Method and its relationship to research on and in schools are presented (2). Next, the methods that were used to create the study review are shown (3). Subsequently, central results of the study review are elucidated (4). Finally, the results are discussed in light of research desiderata (5).

2 Main assumptions about the Documentary Method that are relevant in the context of research on and in schools

Although the Documentary Method remains poorly known in the English-speaking research field, some volumes and articles can be found that explain the methodology and methodical steps of the method in English (e.g., Bohnsack 2010, 2018; Nohl 2010; Weller 2019). In addition, some introductions to these volumes and articles use examples from school contexts. For instance, Astrid Baltruschat (2010) addressed the interpretation of films about school life that had been shot by students and teachers, Bernd Tesch (2018) focused on reconstructing meaning in

2 Publications can also be found in languages other than English, e.g., Portuguese (e.g., Weller & Pfaff 2011), Polish (e.g., Krzyżala 2004), and Turkish (e.g., Nohl 2014). However, as the present paper addresses English-speaking scientists, these additional publications are not further discussed here.

3 For an overview, see the list of publications, updated 5 September 2022, page 144, at <https://www.hsu-hh.de/systpaed/wp-content/uploads/sites/755/2022/09/LitdokMeth22-09-05.pdf>.

the foreign-language classroom, Julia Reischl and Thomas Plotz (2020) presented the methodical steps of the Documentary Method by using a passage from a group discussion with students, Matthias Martens and Barbara Asbrand (2022) set out a procedure for analyzing classroom interaction, and Benjamin Wagener (2022) traced the historical development of the Documentary Method's use with text and visual data by analyzing video recordings of classroom interactions. The present chapter thus goes beyond the scope of a mere introduction by providing insights into methodological and methodical assumptions about the Documentary Method that are relevant to the field of research on and in schools.

At the core of the Documentary Method lies a premise that can be traced back to Karl Mannheim's Sociology of Knowledge (Mannheim 1936, 1982). According to this premise, social actors can gain access to other actors and to the world in two contrasting ways: that is, via *communicative knowledge* on the one hand and via *conjunctive knowledge* on the other hand. Communicative knowledge is characterized by a rationalistic perspective that goes along with a utilitarian and deductive-hierarchical logic which shows as norms, common-sense theories, and roles. As a form of explicit or theoretical knowledge, communicative knowledge can be directly addressed. The goal of the Documentary Method is to transcend communicative knowledge by gaining access to conjunctive knowledge which orients habitual actions. This conjunctive knowledge remains implicit or atheoretical unless it is re-examined from another perspective. Conjunctive knowledge is based on so-called "spaces of conjunctive experience" (Mannheim 1982, p. 204), which means that it is collectively shared and results from processes of socialization. Therefore, in order to examine the two levels of knowledge in a research context, Mannheim (1936, 1982) suggested also using a meta-theoretical framework. This framework comprises two main parts that combine theoretical and methodological assumptions: On the one hand, the Sociology of Knowledge distinguishes between *interpreting* and *immediately understanding* something in social practice. In other words, while communicative knowledge is linked to the level of interpretation, conjunctive knowledge is linked to the level of understanding. On the other hand, in order to gain access to communicative knowledge, the question of objective meaning is posed (i. e., *What is the social action or situation?*). In order to gain access to conjunctive knowledge, the question of documentary meaning arises (i. e., *How is the social action or situation produced?*). However, the intentions and rational motives behind social actions and situations are not taken into account (see also Bohnsack 2018). In addition to other theoretical and methodological assumptions, these main categories guide research that uses the Documentary Method of interpretation.

Although these assumptions were formulated to analyze social interaction in a broader sense, they additionally have great potential for conducting research on

and in schools. As schools are institutions and schooling takes place within an organizational framework, many phenomena that exist in schools can be explored as expressions of communicative knowledge. For example, actors in schools must deal with legal regulations, school curricula and organizational rules – such as class organization, scoring system and the time structure of the school day – as predefined, adults in schools have the role of principals and teachers, and children and youths have the role of students (e.g., Amling & Vogd 2017; Bohnsack 2020). At the same time, conjunctive knowledge is also of interest. Teachers can be assumed to form and rely on specific spaces of experience that stem from their own school days, their teacher training, and their participation in the teaching profession (e.g., Zala-Mezö et al. 2021). While teaching is full of routines (e.g., Hinzke 2018), students also build habitual structures and create practices, for example, for learning or dealing with school requirements (e.g., Helsper et al. 2020).

In this context, it is not surprising that the Documentary Method is increasingly often used in German-speaking scientific communities that conduct research on and in schools. The method offers “a (praxeological) sociological approach based on the implicit experiences of the actors as well as on the knowledge that is documented from interactions and transmitted via artifacts” (Matthes et al. 2022, p. 1). The Documentary Method additionally allows researchers to reconstruct and interpret the explicit and (especially) implicit knowledge of school-related actors (see Gevorgyan et al. 2023). Therefore, the Documentary Method uses four elementary methodical steps, which were originally proposed by Ralf Bohnsack and have now been taken up by various other researchers (e.g., Bohnsack 2010; Nohl 2010; Weller 2019). Whereas the *formulating interpretation* (1) involves summarizing informational content, the *reflecting interpretation* (2) takes another perspective by asking how this content is produced. Here, researchers reconstruct the *modi operandi* and so-called “frames of orientation”, which structure social interaction as expressions of conjunctive knowledge. The central methodological approach is therefore about making comparisons both within and between transcripts or pictures. *Case descriptions* (3) present central results of the interpretation obtained thus far. Finally, *typification* (4) produces condensed results that are based both on contrasting cases in different dimensions and on analyzing minimal and maximal contrasts. Whereas traditionally different frames of orientation are typified, in actual studies, the relationship between frames of orientation (conjunctive knowledge) and so-called schemes of orientation (communicative knowledge) becomes more relevant (e.g., Bohnsack 2018, Wagener 2022; for an example of a study, see Martens & Martens 2022).

By using these methodical steps, studies on research on and in schools reflect the key assumptions about the Documentary Method presented above. However, the

Documentary Method is also open to new developments and can be adapted based on a given research question or epistemic interest.

3 Reviewing English-language studies on research on and in schools using the Documentary Method

The main assumptions about the Documentary Method presented in the previous chapter are primarily based on German-language scientific discourse. However, the present chapter transcends this perspective by depicting the methodical steps involved in creating a review of English-language studies on research on and in schools using the Documentary Method.

Our study review has two main goals: The first goal is to familiarize researchers who want to publish in English with the Documentary Method. We therefore aim to provide novice researchers with insights into the research field, though researchers who are already familiar with the method can use our systematic comparison of studies to position their research either within this field or in relation to similar research on schools. Second, our study review highlights research desiderata. By showing existing research strands and gaps, researchers should be better able to design further research projects. This research review therefore contributes to an ongoing scientific discussion as it enables researchers to consider research on and in schools that uses the Documentary Method in an international context. In so doing, comparisons between studies that have been published in English are addressed. In addition, we hope to stimulate and strengthen the scientific discourse in this research field, which is necessary because the research review – which is presented in Chapter 4 – reveals that only some, loosely connected English-language works have used the Documentary Method thus far.

In order to perform a systematic literature review, we began a literature overview based on the list of publications (see Footnote 3). This list is a bibliography that contains a summary of studies that have used the Documentary Method, and it is divided into different sections. In the section on English-language studies, publications on research on and in schools predominate. We reviewed these studies in order to find – *inter alia* – further literature references. Where possible, we used the so-called “snowball effect” as a second strategy for discovering further studies. Our study selection criteria were a) English-language studies that indicated that b) the Documentary Method had been used to analyze c) school-related topics.⁴ We thereby considered the wording and keywords used within the studies instead of defining for ourselves what we deemed to be thematically appropriate. Our third strategy was to use databases and search engines such as Google Scholar

⁴ These criteria also mean that papers that primarily concerned children and youths as such rather than in their role as students – i. e., in contexts other than at school (e. g., Pfaff 2009) – were not taken into account.

and „Education Research Portal“ of the “DIPF“. By looking for combinations of “Documentary Method” and “school” or “research on/in schools,” we were able to both adjust and expand our list of studies.

In total, we reviewed 39 studies (status: September 2022). However, this number certainly did not include all English-language studies that had used the Documentary Method in research on and in schools. For several reasons, completeness could not be our goal. For example, the list on Research with the Documentary Method is updated yearly by authors and researchers themselves, and it is therefore difficult to estimate how many researchers – from both the German- and English-speaking scientific communities – know about the list or contribute to it. Furthermore, the perception of the results generated by the search engines was based on our own perspectives and backgrounds (as well as on search algorithms). Hence, different word combinations – for example, using the keywords “lesson,” “teacher,” “student,” or “pupil” – could have led to different results that contained studies that could also have been relevant for further examination. Finally, research remains ongoing, and the present review can thus only provide insights into the current state of research.

In order to analyze and compare the 39 studies, we used the same categories that we had developed in NeDoS (Network Documentary Research on and in Schools)⁵ to compare studies and create reviews in the field of German-language research on and in schools. The categories that guided our comparisons were 1) research topics, 2) research questions, 3) research methods, 4) results, and 5) further distinctive features. In the next chapter, in line with the sub-division of the Documentary Method into different sections (see Ch. 2), we focus on the “what” (i. e., *What topics are researched?*) and the “how” (i. e., *How are these topics researched?*). Due to the aims and restrictions already described, our review should be viewed as an introduction that can be used to both generate a discussion and promote scientific discourse on the topic of documentary research on and in schools.

4 Results of the study review

Within the review sample, the oldest study is from 2003, and the newest studies are from 2023. Taken together, the number of studies included in the review increased more than five-fold both between 2003 and 2012 (N=6 studies; 2003–2007: N=2; 2008–2012: N=4) and between 2013 and 2023 (N=33 studies; 2013–2017: N=16; 2018–2023: N=17). This finding can be taken as a sign that greater effort to publish English-language studies that use the Documentary Method in the field of research on and in schools has been made in recent years.

⁵ Funded by the German Research Foundation, January 2020 to June 2023, project number 431542202.

Most of the 39 reviewed studies are papers that are published in international scientific journals (N=24) in Europe or the USA. Of the eleven studies in edited volumes, only three are published without the involvement of a German editor. Of the four monographs, three are PhD studies, and one is a project monograph. As far as we can see, all 39 studies were written by German-speaking researchers or by researchers who had collaborated with German-speaking researchers. Therefore, all of the studies can be concluded to have been written with reference to the German-language discourse on the Documentary Method. Most of the studies (N=27) were conducted in German-speaking countries. The results of these studies were usually also published in German, which means that most of the studies included in this review are likely translations. Other studies stem from other countries – namely Turkey (N=5), Poland (N=3), Armenia (N=2), and Cameroon (N=1). One study stems from Germany but has a focus in schools in Germany, Norway, and the USA.

Concerning disciplinary affiliation, 24 of the studies come from the field of educational science or school education science, while the other 15 were written from various subject-specific or subject-didactic perspectives that cover – *inter alia* – the topics of art, biology, chemistry, English, geography, history, and mathematics. In the next section, we highlight the data collection methods that were used in the reviewed studies (4.1). Subsequently, we present the topics that have been researched thus far and provide insights into the results that the studies generated (4.2).

4.1 Methods of data collection used in the studies

Concerning data collection, methods that produce texts dominate. Ten of the 39 studies are groupdiscussion studies (subject-specific: N=5; school education: N=5), followed by seven video-based studies, which are mainly subject-specific research (N=5 vs. N=2 for school education studies). It is striking that videos were used to gather audio transcripts of classroom interaction, whereas photographs – that is, visual information – were either used to illustrate findings based on the transcripts or were not used at all within the studies. Five studies are interview studies (subject-specific: N=2; school education: N=3), and four studies used audio recordings in classes (subject-specific: N=1; school education: N=3). In addition, in many school education studies, multiple methods were used for data collection within one and the same study (N=12 vs. N=1 for subject-specific studies). For example, videography was combined with participant observation and group discussions (Göhlich & Wagner-Willi 2003), interviews were combined with group discussions (Somel & Nohl 2015; Nohl & Somel 2016a/b), or participant observations were paired with photo documentation, group discussions, video recordings, and interviews (Krzychala & Zamorska 2014) even though the focus of the

studies was on selected methods. Longitudinal studies are quite rare (Krüger et al. 2008; Köhler 2017).

The review also reveals that students were interviewed in only two studies (Köhler 2017; Somel 2019). Studies that used teacher interviews are more common (e.g., Bobeth-Neumann 2014; Sauer 2017; Lagies 2021), and experts in the field of school were also interviewed (e.g., Nohl & Somel 2016a/b). When it comes to group discussions, however, the perspectives of students predominate (e.g., Asbrand 2011; Martens 2015; Wagener 2018; Lubert et al. 2020). Most of the reviewed research involves teachers, students, or teacher-student interactions (e.g., Kreft & Viebrock 2022; Martens & Martens 2022), with parents having been interviewed in only one research project (Nohl & Somel 2015, 2016a/b; Somel & Nohl 2015), the same for student teachers (Loemke, 2014). Other actors or artefacts – such as school-relevant documents, students’ work results, and school homepages – were not analyzed.

4.2 Research topics and research findings

Concerning the research topics, four clusters could be discerned. These clusters do not contain all 39 studies because some studies address topics that have not often been researched thus far. We return to these studies at the end of the present chapter. Below, the four clusters and central results of the respective studies are presented (see table 1).

Table 1: Clusters of research topics

<i>Cluster 1: Student learning</i>	Asbrand 2011; Applis 2015; Martens 2015; Kater-Wettstädt 2018; Wagener 2018; Lubert et al. 2020; Hofmann 2021
<i>Cluster 2: Classroom interaction</i>	Jahr et al. 2016; Hempel & Jahr 2017; Gresch & Martens 2019; Gresch 2020; Hackbarth et al. 2022; Kreft & Viebrock 2022; Martens & Martens 2022; Gervorgyan 2023; Gervorgyan et al. 2023
<i>Cluster 3: School reform and teacher education</i>	Nohl & Somel 2015, 2016 a/b; Somel & Nohl 2015; Krzychala 2020; Hassana 2021
<i>Cluster 4: Transitions in the school context</i>	Göhlich & Wagner-Willi 2003; Krüger et al. 2008; Schittenhelm 2010; Bobeth-Neumann 2014; Köhler 2017

In the first cluster, different aspects of *student learning* are addressed. On the one hand, in some subject-specific studies, specific teaching methods – including the Mystery Method (Applis 2014, 2015) and approaches such as playing a certain game in class (Hofmann 2021) and performing fieldwork (Lubert et al. 2020) – were implemented and then evaluated. On the other hand, some studies focus on rather fundamental topics – such as students’ personal epistemologies regarding

subject-specific concepts (Martens 2015) – or on learning experiences (Asbrand 2011; Wagener 2018) and on dealing with students' processes (Kater-Wettstädt 2018) in specific contexts.

With regard to the results, some of the studies present typologies of student learning. Laura Luber et al. (2020) reconstructed four types of student orientations toward performing fieldwork in geography, two of which were called “excluding” (i. e., marginalization and distancing), and two of which were called “including” (i. e., integrating and normalizing). Jan Hofmann (2021) presents types of students' ethical decision-making, and Marina Wagener (2018) discusses types of learning experiences when sponsoring a child from the Global South. Other studies used contrasting cases to illustrate central findings. For example, Martens (2015) presents different perspectives on historical accounts: Whereas some students conceptualized historical information as a picture of the past, other students viewed this information as an interpretation of the past. The two studies by Stefan Applis (2014, 2015) reveal that youths preferred complex teaching methods with a cooperative design compared with one-dimensional approaches when dealing with the phenomenon of globalization, and Asbrand (2011) elucidates the role that peer culture plays in learning and claims that the possibility of assuming responsibility motivated students to participate in occupations in the context of certain learning arrangements within a world shop. Whereas these studies present student orientations that are relevant for learning, the study by Lydia Kater-Wettstädt (2018) is about students' competences. In the context of sustainable development classes, three key competences were identified that had emerged within different pedagogical arrangements that dealt with the state of not knowing, with perceptivity, and with calls to action.

The second cluster also focusses on students but mainly addresses *classroom interaction*. It primarily consists of subject-specific studies that focus on topics that included addressing teleology in biology (Gresch & Martens 2019; Gresch 2020; Martens & Martens 2022), acquiring new knowledge in writing lessons (Hackbarth et al. 2022), discussing actual topics in civics classes (Jahr et al. 2016; Hempel & Jahr 2017), and negotiating meaning and developing transcultural competences in the English classroom (Kreft & Viebrock 2022). Most of these studies – which used videography – deal with student-teacher interaction, whereas two studies take the interaction between students into account (Hempel & Jahr 2017; Hackbarth et al. 2022). The role that materials played in classroom interaction is analyzed in one study (Martens & Martens 2022), and two studies focus on the production processes of knowledge about gender in classroom discussions (Gevorgyan 2023; Gevorgyan et al. 2023).

The results of these studies reveal how students' learning processes can take place via student interaction. These learning processes can be analyzed by exploring the interactions between certain students. Anja Hackbarth et al. (2022) describe

learning processes as entering a new subject-specific space of experience via the example of writing practice and show how the acquisition of knowledge could take place via actionist practices. Helge Martens and Matthias Martens (2022) grasped learning processes by analyzing how students dealt with learning materials, and the authors reveal that in the biology classroom, only a few everyday objects were transformed into objects for subject-specific learning. Christopher Hempel and David Jahr (2017) argue that students who had discussed immigrant policy had mainly taken an economic perspective to reason their arguments and had not considered other perspectives. This argument is in line with findings from a study by Jahr et al. (2016) that shows that controversies could arise in students' discussions of current topics in civics classes, but these controversies were based on shared orientations. Students' learning processes were also analyzed via the interaction between students and their teachers. Annika Kreft and Britta Viebrock (2022) show how learning processes were impacted by institutional contexts, such as the classroom setting, the mode of working, specific stimuli, and teachers' orientations, and Helge Gresch and Matthias Martens (2019) use the example of teleology to demonstrate the importance of tacit communication and tacit epistemology, which were essential for students' knowledge construction in biology classes. Gresch (2020) points out a discrepancy between how teachers were able to reconcile certain norms of teaching in interviews and how they acted in their classrooms. Finally, Zhanna Gevorgyan (2023) and Gevorgyan et al. (2023) also focus on teaching in classes and reveal that despite incongruencies concerning gender topics on the explicit level, on the implicit level, the reproduction of patriarchal binary gender roles, shared understanding and conjunctive knowledge among classroom participants is demonstrated. Due to sense-genetic typification three main types were found in Gevorgyan's (2023/in prep.) study moralization, cultural essentialism, and gender essentialism.

The third cluster – on *school reform and teacher education* – transcends the perspectives of individual school actors and of classroom interaction by using multi-level analyses and different data sources. Based on analyses of certain schools, statements about developments in the respective school system and about teacher education were made. A study from Cameroon addresses the role of actors' socio-cultural backgrounds in a school-reform project (Hassana 2021), a study from Poland analyzes school change as a process of creating and transforming professional knowledge (Krzychala 2020), and a study from Turkey takes into account tutorial practices and the relevance of knowledge paths in the context of a curriculum change (Nohl & Somel 2015, 2016a/b; Somel & Nohl 2015).

In terms of results, Hamidou Hassana (2021) shows the importance of actors' sociocultural backgrounds when it comes to the success of a school-reform project. The study reveals that a project's sustainability – that is, how much teachers engage in transforming their teaching and learning routines – is deeply linked to the

extent to which features of actors' sociocultural backgrounds are taken into consideration. Slawomir Krzychala (2020) also points out the importance of teachers' learning when focusing on school-development processes. In his study, four forms of professional orientation patterns are analyzed as forms of incorporating new pedagogical practices into schools: that is, niche, instrumental, apparent, and synergetic activities. Arnd-Michael Nohl and R. Nazlı Somel (2015) also show the importance of shared orientations between teachers as these shared orientations reveal – *inter alia* – the degree to which dealing with an official, new curriculum was influenced by generation-specific orientations in teachers' organizational milieus (also Somel & Nohl, 2015). The authors additionally demonstrate how the three reconstructed organizational milieus of teachers correspond with different forms of capital among students' parents (Nohl & Somel 2016b), and they analyze steps along the knowledge path as a framework within which the process of curriculum change takes place (Nohl & Somel 2016a).

In the fourth cluster, different aspects of *transitions* in the school context were investigated. Whereas one study focusses on the career paths of teachers' aspirations to become principals (Bobeth-Neumann 2014), the other studies address students' transitions. Transitions in everyday school practice and underlying micro-rituals are discussed (Göhlich & Wagner-Willi 2003), as are changes in peer relationships among students when transferring from one educational system to another (Krüger et al. 2008). School-to-work transitions among younger women with migration backgrounds (Schittenhelm 2010) and school-to-work transitions in the context of vocational educational (Köhler 2017) were also researched. Compared with the other three clusters, the studies in this cluster are the oldest, with no studies being more recent than from 2017.

In light of the results, only a few links exist between the individual studies in this cluster. Wiebke Bobeth-Neumann's (2014) types of orientations of teachers who aspire to become principals – that is, “non-committal experimentation,” “social distinction,” “social validation,” and “gradual advancement” – cannot be compared with the student transitions that were analyzed in the other three studies. However, results differ between these three studies due to differing thematic priorities. Michael Göhlich and Monika Wagner-Willi (2003) found differences with regard to everyday school life among students who were changing schools and point out how cultural differences were evident when performing everyday rituals. In their case study, Heinz-Hermann Krüger et al. (2008) traced the development of two girls and focused on the relationship of change in peer culture and school. Whereas the peer culture of the one girl mirrored her attitude toward school, the other girl considered her peer world to be an escape from school and lessons. Karin Schittenhelm (2010) reconstructed the collective orientations of young women with migration backgrounds in the context of the school-to-work transition. Although similarly structured perceptions concerning the entry into

the working world were found, distinct types of coping with the status passages were analyzed. Finally, Sina-Mareen Köhler (2017) discovered that the vocational educational programs that she had investigated were disconnected from the everyday life of ninth and eleventh graders. The reconstructed transition pathways reveal the importance of other socialization aspects – including family support for the school-to-work transition – and illuminate the relationship that educational programs have with these aspects.

Whereas at least four studies from different research projects could be found in each of these clusters, eleven studies could not be clustered because they address quite different research topics. In the field of teacher research, communities of practice (Krzychala 2019), the role of gestures during lessons (Abels 2016), the relevance of being trained in a subject (Lagies 2021), parent-teacher counselling (Sauer 2017), and the role of differences in inclusive classrooms (Sturm 2019) were taken into account. In the field of student research, dealing with media in the classroom (Kraus 2007) and the relevance of rituals in daily school life (Göhlich & Wagner-Willi 2010) were investigated. Beyond these topics, one study focusses on various dimensions of schooling (Krzychala & Zamorska 2014), one study focusses on educational inequality (Somel 2019), and another study focusses on developments – that is, on shifting frameworks of thought and practice – among art students (Loemke 2014). Finally, one study takes into account how preservice teachers learn by dealing with perplexities experienced in inquiry-based learning courses at university level (Paseka et al. 2023).

5 Conclusion and outlook

The present study review reveals that a range of topics in the context of schools have been investigated in the English-language literature using the Documentary Method. The focus is on students as well as on their learning and transitions, on classroom interaction between students as well as between teachers and students, and on school reform. The analyzed studies come to varying results in the area of research on and in schools as well as in the context of subject-specific research. For example, it becomes evident that implicit knowledge in the form of frames of orientation is important in teaching as well as for learning processes. The logic of classroom interaction and the relevance of sociocultural elements to school reform become visible. These results should not only facilitate further research, but also serve as a source of information that students can use to reflect on their learning and that teachers can use to reflect on their teaching as well as on their involvement in processes of school development. In summary, the Documentary Method can clearly be seen to be a valuable tool for uncovering routines and implicit knowledge that are relevant to learning processes and social interaction in schools. However, compared with the German-language literature that has used the Documentary Method in research on and in schools, a few gaps should be addressed.

For example, the study review found hardly any research on becoming a teacher – that is, hardly any English-language research on preservice teachers and teacher education. For German-language research, in contrast, an entire research branch on teaching students that covered different topical issues was found (see Wittek et al. 2023). Second, few English-language studies on school-development processes have used the Documentary Method compared with studies from the German-language literature (see Hinzke & Bauer 2023 in this vol.). Third, no English-language research on school culture – which is a popular topic for using the Documentary Method in the German-language literature (see Kowalski et al. 2023 in this vol.) – could be found. Fourth, in the English-language literature, schools are generally not viewed as organizations, which also differs from the perspective taken in the German-language literature (see Kessler 2023 in this vol.).

Research desiderata could stem from these observations. For example, processes of professionalization in the context of teacher education should represent an ongoing field of research, especially in light of a) teaching requirements in inclusive classrooms, b) dealing with heterogeneous students, and c) digitalization in the classroom. These topics could also inspire – *inter alia* – further research on school-reform and school-development processes in addition to inspiring studies on student learning processes in the 21st century. In addition, aside from research on students and teachers not (much) research yet exists in English or German on actors in school, such as research on school management, on parents, or on actors that play a major role in all-day schools or in fostering inclusion in schools (Matthes et al. 2023 in this vol.).

With regard to methods, a few of the studies investigated here used visual data. However, concerning the use of the Documentary Method in German-language studies, images were rarely used as a survey method or as empirical material, and despite the relevance of pictorial approaches to the development of the social world, “the marginalization of the picture“ (Bohnsack, 2010, p. 267) remains predominant in research on and in schools. Another similarity between English- and German-language literature is that the typification step is frequently absent in publications (Hinzke et al. 2023 in this vol.). Additionally, although content and publication style depend – *inter alia* – on the expected readers and on publishers’ requirements, it is evident that in some English- and German-language studies, methodological premises and/or methodical aspects and decisions are rarely presented. It is therefore sometimes difficult for the scientific community to comprehend and value the results of such studies and to use these results for personal research. Future research could reflect on these methodical observations.

The present study review additionally reveals that based on the absence of references, even in studies from the four topical clusters presented above, the investigated studies were generally not linked with one another. Whereas nearly every study referred to a few methodical texts on the use of the Documentary Method

(e.g., Bohnsack, 2010 or Nohl, 2010), these studies usually did not take other English-language studies on the same or related topics into account. It thus becomes evident that no coherent research branch of English-language research on and in schools that uses the Documentary Method yet exists. In fact, the first topical clusters are only now just beginning to take shape. In light of the increasing number of publications in the field, it can be assumed that these clusters will become more coherent in the coming years and that additional clusters will arise.

Although the present review does not claim to be exhaustive, it provides insights into the state of research on English-language studies that use the Documentary Method in the field of research on and in schools. The review should be updated in the future in order to continue to be able to inspire additional research. It is also important to mention that we interpreted the investigated studies in order to create the present review. In fact, nearly every study addressed more than one topic. For instance, research on school reform may also have focused on teachers' roles, on classroom interaction, and/or on students' orientations toward teaching. Considering the overlap between the topics, this review can be viewed as an approximation. Following the principle of the Documentary Method of constant comparison (Ch. 2), the review calls for further discussion and likely also further development.

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