Successful succession through shared leadership: Preparing a new generation of educational leaders

Peter R. Albion
University of Southern Queensland, Australia
Peter.Albion@usq.edu.au

Hannah J. Gutke
Jubilee Primary School, Gold Coast, Australia
hcutke@bne.catholic.edu.au

Abstract: Changes in technology and society present challenges for education systems around the world. A generation that has grown up amid rapid developments in technology is disposed to believe that change is the natural order of things, in employment as in other aspects of life. Retaining teachers and nurturing the next generation of leaders presents new challenges in such an environment. Although there is likely to be no simple solution, some pointers to effective strategies may be found through understanding and responding to the characteristics of the rising generation. As representatives of the retiring and advancing generations, the authors of this paper bring a personal perspective to the challenges and the potential solutions.

Focus area

This paper considers some important issues surrounding the development of educational leadership for the coming decades. The authors, father and daughter, are from the generations approaching retirement (Baby Boomer) and making the transition to leadership positions (Millennial). Their complementary experiences provide a foundation from which reflection is informed by the literature of educational leadership and generational differences.

These generations have lived, and are living, through a period of rapid change that affects every aspect of life and, because so much of the change is bound up with the increasing volume and accessibility of information, has profound implications for education. Because knowledge is expanding and changing so rapidly, it is no longer reasonable to expect that the years of formal schooling undertaken as a child can provide all the education necessary for an adult life. Instead, life-long learning is required (Brown, 2006), as much for teachers as for taught.

In a world where serial careers are becoming the norm (Porfeli & Vondracek, 2009) and the attrition rate among beginning teachers has been described as alarming (Herrington, Herrington, & Ferry, 2006), it is important that education systems do what they can to minimise the loss of skilled teachers. Adjustments to the work environment that accommodate the changing characteristics and expectations of the new generation of teachers will be part of the solution.

Even without the potential for further loss of future educational leaders through excessive attrition, there is evidence of an impending leadership crisis in many western school systems. While current leaders have become disenchanted with some policy directions, especially the standards agenda, and are leaving in increasing numbers, there is “an insufficient pool of capable, qualified, and prepared replacements” (Fink & Brayman, 2006, pp. 62-63). Development of educational leaders for the next decades is a key challenge for which solutions are needed now.
Rationale

There is ample evidence that effective leadership is a key element in the success of schools and other educational institutions. However, it is less clear how that leadership should be exercised in a period of rapid change in society and its institutions, including education. Neither is it clear how best to develop the educational leadership capacity that will be required over the coming decades.

Australian higher education providers have offered graduate qualifications in educational leadership and related areas for at least half a century but there have been few Australian education systems that have required such formal preparation for aspirants to principal or other positions of responsibility in education. Although some individual educational leaders and aspirants to leadership completed such awards and found them to be valuable sources of learning, possession of the award seldom, if at all, conferred any advantage for career advancement. There are signs of increasing acceptance of such qualifications and it seems likely that Australian education systems may be moving toward the expectation, common in other places such as the USA, that educational leaders should be formally qualified. However, regardless of whether aspirants for educational leadership possess relevant formal qualifications, they will require experience in teaching and the exercise of educational leadership at beginning levels. Hence there is a need to limit attrition of future leaders through fulfilling career experiences and to provide them with opportunities to experience and offer effective educational leadership. At the same time it is important that graduate programs intended to prepare educational leaders should respond to developments in schools as well as reflecting current research in the field.

For any leadership development effort to be successful it is vital to consider the context in which leadership must be developed and exercised. Thus it is useful to begin by reviewing some of the major social and technological changes that are affecting schools and the teachers who work there. It then becomes possible to explore ways in which the strengths of the rising generation may be harnessed to overcome the challenges that the changes present for development of effective educational leadership. It may be that we will discover that the apparent sources of the challenges we face also contain the seeds of solutions.

Background

The ideas presented in this paper are set against the life histories of the authors who, as father and daughter, represent the two generations of educators at either end of their careers.

Baby Boomer

A little more than sixty years ago the senior author was born in the early years of the post-war baby boom. His first decade was a time of considerable social and technological change. Recollections include an influx of European immigrants, paving of city streets, construction of the city sewerage system, and the first black and white television broadcasts.

Although previous generations in his family had left at the end of primary school for employment, education was valued and success was strongly encouraged. School was structured around teacher-centred classes with formal tests from the early years and statewide formal examinations at Years 8, 10 and 12 determining progression to subsequent levels of education. More than 50% of children finished schooling at Year 8 and only a small minority progressed to university. Although the teaching staff in schools included women they were
only rarely in positions of authority. Opportunities for women to advance were limited by requirements to resign for childbirth.

His performance through secondary schooling earned a scholarship and the opportunity to complete a degree before undertaking a teaching qualification at a time when the minimum requirement for employment as a teacher could be as little as one to two years of post-school education. Further opportunities during university study resulted in his graduating with a masters degree in science before qualifying as a teacher and accepting appointment to a high school in a rural town.

Marriage, children, further study including in educational administration, and six years of teaching experience led to appointment as principal of a small secondary school. Four years in that school and five in another as principal, were followed by a shift in location and transition to the role of teacher educator in a university where he completed a doctorate. At that time, almost twenty years ago, doctorates were rare in education and were most often earned while working as a teacher educator rather than being required for appointment, as is now the case.

**Millennial**

A little more than thirty years ago the junior author was born close to the beginning of the millennial generation. Within months of her birth, her father was appointed principal and acquired his first personal computer. She has no recollection of a world without paved streets, colour television, and computers in homes.

As the daughter of educators, her father a principal and her mother a former teacher, she was well acquainted with schools and teachers even before she commenced her own formal education. Her schooling was generally more student-centred than had been the case thirty years previously and a good proportion of the assessment was based on assignment work. The only external examination was the statewide scaling test in the final year of secondary school. More than 70% of children completed twelve years of schooling and a considerable proportion went on to further study. A majority of staff at all levels of schooling were women and increasing, though not yet equitable, numbers were in positions of authority.

After careful consideration to avoid simply following a family ‘tradition’ she opted to pursue teaching as a career. Her decision was confirmed by strong performance and a sense of satisfaction in the practical work. She graduated and was appointed to a primary school where she quickly demonstrated her capability.

Marriage, graduation with a masters degree, and her first child followed. Experience and a change of school brought opportunities for leadership. They also raised questions about the development of leadership among her generation and the challenges of balancing family life with work. Those questions are at the core of this paper.

**Exploration**

Although we are told often that we are living in an “information economy” there is an alternate view, which argues that, if economics is about balancing scarce resources, it may be truer to say that we have an “attention economy” because it is attention, rather than information, that is in short supply (Goldhaber, 1997). The abundance of information and the ease with which it can be accessed using the World Wide Web (WWW) is affecting all aspects of life, including education. Prior to the WWW the principal challenge facing teachers and learners in relation to information was one of accessing a scarce resource but now the major challenge is to select and use the most appropriate information from the vast
volume that is available (Albion & Maddux, 2007). In such an environment it makes little
sense to teach and learn as though it might be possible, in a few years of schooling, to store
up the knowledge needed for life. Lifelong learning has become a necessity for all and is at
least as much about learning to be as learning about (Brown, 2006).

The impact of these changes on our lives is profound. History is full of examples in
which expanding knowledge and new technologies have resulted in old jobs disappearing and
new ones emerging so that the spread of occupations among successive generations was
different. Now the difference is that the rate of change is sufficient for the ebb and flow of
jobs to occur, possibly more than once, within a single working life and people can be
expected to have serial careers rather than spend an entire life with a single employer as was
common in the previous generation (Porfeli & Vondracek, 2009). Although there is no sign
yet that teaching will disappear as an occupation, the changes are affecting the nature of the
work, making it less attractive to some. Moreover, the combination of new career
opportunities and a broad societal expectation of career mobility is encouraging teachers to
consider their options. The result is a rate of attrition among teachers that has been described
as alarming (Herrington, et al., 2006).

The rapidity and complexity of the changes occurring in the wider society and in
education are making it impractical, if it ever was, for a single leader to be conversant with
all that needs to be known to effectively lead a school. It is no longer practical to see the
principal as the only leader in schools (d'Arbon, Duignan, & Duncan, 2002; Duignan, 2008;
Duignan & Bezzina, 2006; Lambert, 2002). With the increasing demands placed on
educational settings in contemporary contexts, schooling becomes more challenging and
leadership becomes more essential. Duignan and Bezzina (2006) identify this as one of the
push factors that drive organisations toward more shared approaches to leadership.

Successful educational leaders must provide clear direction and exercise influence
rather than lead with more traditional, autocratic approaches (Leithwood & Reihl, 2003).
Shared leadership supports this idea, encouraging the collaboration of all members of a
community in taking responsibility for leadership. Schools and organisations that share
leadership create and maintain a shared vision for student development and learning, and
empower staff to develop their own leadership capacities within professional learning
communities. As all members of a community become involved in its leadership and
decision-making, commitment and motivation are increased and student learning improves
(Busher, 2005; Duignan & Bezzina, 2006; Lambert, 2002; MacNeil & McClanahan, 2005).

Respecting and valuing individual talents and achievements is an important element
and Rudd, 2009) identify regular celebration of accomplishments as an important leadership
commitment. At one school in which the junior author has worked, celebration staff meetings
were held quarterly to recognise significant accomplishments by community members,
motivating individuals to use their talents, thereby bringing diversity to teaching, learning,
and decision-making processes.

Effective professional learning communities (PLCs) are noted as having sustained
positive impact on student learning, staff practice and retention, and leadership capacity
across the whole school (Watson & Steele, 2006). Efforts to implement this approach have
been evident in all schools at which the junior author has worked. Most recently, emphasis
has been placed on whole staff professional development, including specialist teachers and
administration staff. Providing opportunities for professional discourse and sharing has also
been evident as a priority at staff meetings.

An example of how shared leadership can be encouraged at all levels is a Beginning
Teachers Cluster Group, which was facilitated with the support of local principals. Through
 provision of collaborative opportunities, neophytes were encouraged to take on leadership
roles by chairing meetings, devising agendas, and identifying discussion topics and professional development needs. While the group was seen as a positive way of providing support to beginning teachers in the hope of improving teacher attrition (Gutke & Albion, 2008), it was also seen as another positive way that leadership could be shared across the organisation.

In addition to high teacher attrition rates, there is also evidence to suggest that there are fewer educators aspiring to the role of principal (Fink & Brayman, 2006). Reasons include the negative impact of the principalship on personal and family life, unsupportive external environments and organisations, a feeling of inadequacy to do the job effectively, and a perception of having to forfeit close relationships with colleagues and students (Bottery, 2006; d’Arbon, et al., 2002).

![Conceptual framework for shared leadership succession](image)

Figure 1: Conceptual framework for shared leadership succession

A succession management plan is largely about developing leadership by sharing leadership, by creating opportunities for development by aspiring leaders, existing leaders and transitional leaders. Many within the aspiring leaders group belong to Generation Y.
which is generally regarded as people born between 1977 and 1995 (Behrstock & Clifford, 2009). Also known as Millennials, Ys are noted as having distinctive ideals, values, and opinions. Shared leadership is an approach which will support the collaborative, inclusive, generational characteristics of Generation Y, who typically value flexibility and diversity of experiences and work best in inclusive self-led teams. Ys like to contribute. They are creative, innovative and self-confident. Ys are well-educated and technologically savvy (Behrstock & Clifford, 2009; Cruz, 2007; Vicere, 2005). Many of these values are ideally suited to a shared leadership model.

As the generational group known as “Baby Boomers” approach retirement, it is important to develop a pool of leaders for the future. While the implementation of a succession management plan responds to aspects of generational differences, there are changes to wider organisational structures that could better support a shared leadership model and Generation Y perspectives. Figure 1 presents a conceptual framework that links principles of shared leadership to typical Generation Y perspectives as identified in the literature and identifies five key strategies that could support shared leadership succession by Generation Y.

**Empower and Support All for Leadership**

Vicere (2005) notes that Gen Y want to make an impact. They want to lead and to partake in decision-making, making them ideal candidates for establishing a culture of shared leadership. When teachers are involved in decision-making, motivation and commitment are increased, resulting in change being implemented more effectively (MacNeil & McClanahan, 2005).

Gen Ys, also referred to as Millennials, must be given opportunities to assume leadership responsibilities from the start of their career. Ys are typically confident, and “many would not think twice about deciding to become a principal, or transitioning to a different job in the field after only three or four years as a teacher” (Behrstock & Clifford, 2009, p. 8). Providing opportunities to share leadership in areas that use their expertise (e.g. website development, staff committees, organising events) is a positive and important approach to working with Gen Ys, and to ensuring smooth relations with colleagues from other generational groups who expect young teachers to prove themselves through competency before leading others (Behrstock & Clifford, 2009). Diversity of experiences also supports typical Gen Y perspectives and can contributed to reducing attrition rates (Behrstock & Clifford, 2009). Support and encouragement in leadership endeavours, rather than being taken advantage of by colleagues who are keen to delegate responsibilities, would enhance authentic shared leadership contexts (West-Burnham, 2004).

As schools become more complex organisations, leadership becomes a collective responsibility (Duignan & Bezzina, 2006; Lambert, 1998). Gen Ys are typically unafraid of accountability. For shared leadership succession by Gen Y, systems should embrace this confidence and commitment in order to empower all for leadership. Shared leadership supports a more distributed approach to school leadership than more traditional autocratic leadership styles (Lambert, 1998; NCSL, 2007). De-emphasis of hierarchies supports Gen Y perspectives (Chatterji, 2009).

**Provide Opportunities for Collaboration**

Millennials have been nurtured in environments emphasising cooperative learning, teamwork and negotiation, and as such are good contributors and collaborators (Lancaster & Stillman,
For Ys, sharing responsibility for school leadership is preferable to working in schools where more traditional autocratic leadership structures are in place. Collaborative work is directly linked to school improvement and improved learning (Lambert, 1998). Ys are so committed to achievement and to changing the world for the better that they embrace collaboration, seeing it as a means of ensuring that change is more likely to occur. Working with and through others, and enabling them to lead is a key element of a shared leadership model (Busher, 2005; Duignan, 2008; Harris, 2004; Lambert, 2002; Leithwood & Reihl, 2003), and one that Ys are likely to support whole-heartedly (Thorman, 2007). It is important to note that working through others is different from using others, and that authentic shared leadership models embrace a supportive model of trust and genuine collaboration.

Millennials value mentoring relationships and value leadership from those who guide and coach them (Cruz, 2007). Fostering positive relationships to construct a sense of community is achievable through shared leadership. Online collaborative solutions such as e-mentoring also support technologically savvy Gen Ys (Richardson, 2008).

**Support Career Development and Planning**

Gen Ys place high value on education and are set to become the first true generation of lifelong learners (Richardson, 2008). Lambert (2002) highlights the importance of learning together in order to effectively lead together. Millennials will flourish under conditions that allow legitimate shared leadership to take place through the development of shared visions for teaching and learning, and the establishment of professional learning communities (PLCs). Capitalising on differences through cross-generational PLCs contributes to positive, sustainable school leadership (Behrstock & Clifford, 2009).

Building leadership capacity is an important aspect of shared leadership approaches that aim to develop sustainable school improvement (Lambert, 2002). Capacity building could be the incentive for Gen Ys to remain in the profession providing them with the means of developing career paths that are in line with their own interests and ambitions. Gen Ys like to see opportunities for advancement and for personal and professional growth (Behrstock & Clifford, 2009).

Due to increasing external pressures and other perceptions of the role, there are fewer people aspiring to principalship (Fink & Brayman, 2006). Shared leadership reduces some of the role pressure, supports the development of leadership potential and builds leadership capacity (Lambert, 2002; NCSL, 2007). Succession planning that includes opportunities for experiential learning and diversity of experiences will support shared leadership succession by Gen Y (Behrstock & Clifford, 2009; Chatterji, 2009).

**Allow Flexible Work Options**

Generation Y work hard, but on their own terms (Vicere, 2005). They are the iGeneration: technologically savvy, and used to attending to things at times that are convenient to them. They might attend work for only the required hours, but are usually accessible via email or mobile phone at all hours of the day and night (Cruz, 2007). Collaboration and discussion via digital means allows this flexibility.

Gen Ys also value family and life outside of work. They work to live, rather than live to work (Lancaster & Stillman, 2002). Their values need to be supported by organisational structures that support flexible work arrangements, including opportunities to remain involved in school leadership while working in part-time capacities. In a workforce heavy with young female employees and job-share teaching arrangements, family-friendly
opportunities for leadership need to be considered and promoted. The contribution of every employee needs to be valued and support mechanisms should be put in place to ensure equitable access to leadership opportunities.

**Celebrate Achievements and Value Individuals**

A creative and innovative group, Gen Ys expect to be acknowledged and praised consistently. “These are the children who received trophies for finishing in 8th place” (Lovely, 2007, in Richardson, 2008, p. 2). Organisations should support this desire to be acknowledged. Ricketts and Rudd (2002) state that within a shared leadership approach, individual contributions should be celebrated. Diversity of opinion should be valued and opportunities for sharing of these opinions should be supported (Busher, 2005; Harris, 2004; Lambert, 2002).

Individual strengths and weaknesses can be balanced through shared approaches to leadership (Duignan & Bezzina, 2006). Promoting a level playing field where all community members are acknowledged and valued is supportive of the inclusive values of Gen Y and also matches neatly with a shared leadership approach.

**Conclusion**

The issue of shared leadership succession by Generation Y is of personal importance to the authors. As a Boomer, the senior author feels responsibility, to the profession and to his children and grandchildren, to ensure that there is appropriate educational leadership in the coming decades. As a Millennial, the junior author resonates with a number of the typical perspectives that have been evident in the literature, and has a preference for shared approaches to leadership in order to support school improvement. Empowering and supporting all for leadership allows her to be involved in school and organisational decision-making and leadership. Such involvement allows her to develop her capacities as a leader. Through the support of her colleagues, she is encouraged and given opportunities to make a difference, energising her to remain in the profession and to aspire to formal leadership positions.

Opportunities for collaboration support the Gen Y preference for working with teams and being involved in professional discourse. In her current role as a part-time teacher the junior author has valued opportunities to collaborate digitally. School decision-making via online avenues such as Etherpad, SurveyMonkey and group emails has allowed for involvement from a distance and at times that are personally convenient. Emphasis on this method of communication and collaboration would certainly support her preference for flexibility and remaining connected, which are highlighted in the literature as typical perspectives of Gen Y (Behrstock & Clifford, 2009; Chatterji, 2009; Richardson, 2008).

Career development and planning is important to Millennials (Behrstock & Clifford, 2009; Chatterji, 2009). Involvement in leadership succession programs and experiential learning supports identification of personal strengths and weaknesses and encourages planning for further professional development. Gen Y employees appreciate these opportunities and such programs should be sustained and widely accessible.

Work-life balance is important to Millennials (Cruz, 2007) and has become increasingly so for the junior author since she became a mother. Flexible work options that support this balance would allow her to remain involved in shared leadership. As a full-time employee, she was provided opportunities for experiential learning in middle management roles but formalised leadership roles are often not available part-time. This has the potential to limit her opportunities for leadership until she is ready to return to full-time work. Shared
leadership approaches would allow her to continue to develop her leadership capacities and to be included in school decision-making. The benefits to both the individual and the broader societal institution of education from a more inclusive approach to leadership would be substantial.

**Recommendations**

In response to the literature represented in the framework and to the five strategies that have been identified above, more specific directions have been developed to demonstrate how the issue of further supporting shared leadership succession by Generation Y could be redressed. Figure 2 provides practical examples for the implementation of the strategies. The examples listed are by no means exhaustive, but they do provide a starting point for evaluating organisational performance in relation to the issue.

<table>
<thead>
<tr>
<th>Strategies for Shared Leadership Succession by Generation Y</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Principle of Shared Leadership</strong></td>
</tr>
<tr>
<td><strong>Empower All For Leadership</strong></td>
</tr>
<tr>
<td>- Continue to strongly articulate a shared vision for teaching and learning: policy development, professional development tool.</td>
</tr>
<tr>
<td>- Allow opportunities for decision-making by all.</td>
</tr>
<tr>
<td>- De-emphasise hierarchies: development of Professional Learning Communities inclusive of staff from all levels of the organisation.</td>
</tr>
<tr>
<td><strong>Provide Opportunities for Collaboration (with a focus on technology)</strong></td>
</tr>
<tr>
<td>- Value discourse and provide regular opportunities for professional discussions: staff meetings, online discussion boards, professional development.</td>
</tr>
<tr>
<td>- Further support and enhance Professional Learning Communities: supplement existing professional development opportunities with continuing online components.</td>
</tr>
<tr>
<td>- Promote mentoring relationships that include online components: develop strong beginning teacher networks that support collaborative learning; develop e-mentoring opportunities for aspiring and emerging leaders.</td>
</tr>
<tr>
<td><strong>Support Career Development and Planning</strong></td>
</tr>
<tr>
<td>- Enhance access to multiple opportunities for personal and professional development (PD): develop equitable policies for involvement in organization-funded PD; continue to offer scholarships for further education and training.</td>
</tr>
<tr>
<td>- Highlight opportunities for leadership and for career advancement: include this as a focus of beginning teacher induction programs.</td>
</tr>
<tr>
<td>- Provide support for the creation of customised career paths in line with interests and ambitions: professional goal setting and review with support of mentors.</td>
</tr>
<tr>
<td>- Continue succession management planning programs.</td>
</tr>
<tr>
<td><strong>Allow Flexible Work Options</strong></td>
</tr>
<tr>
<td>- Use technology to provide opportunities for involvement in leadership and decision-making at convenient times: Survey Monkey, e-learning; blackboard communities; staff portals.</td>
</tr>
<tr>
<td>- Provide opportunities for part-time leadership: experiential learning through acting positions: shared responsibilities in middle management.</td>
</tr>
<tr>
<td><strong>Celebrate Achievements and Value Individuals</strong></td>
</tr>
<tr>
<td>- Encourage and value diversity and self-expression.</td>
</tr>
<tr>
<td>- Value individuals: regular constructive feedback; welcome lunch for new teachers; picture and blurb in school newsletter/websites.</td>
</tr>
<tr>
<td>- Celebrate individual and collective achievements through a variety of avenues: newsletters; website; staff meetings; wider media.</td>
</tr>
<tr>
<td>- Encourage students and acknowledge that all are life-long learners with valuable contributions to share that will support school renewal and development.</td>
</tr>
</tbody>
</table>

Figure 2: Practical examples for implementing shared leadership succession

For all that some aspects of the Millennial character present particular challenges to their long term engagement as educators and leaders, there are other aspects that provide clues to how they may be so engaged. If the present generation of educational leaders is able to look beyond the apparent challenges associated with the generational change to the opportunities it is possible to construct shared leadership in ways that will help to ensure successful succession.
References


