

Implications for Succession Planning

CENSUS SURVEY REPORT



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In January 2009 the Catholic Principals' Council of Ontario conducted its third census survey to gather statistics on members in terms of experience, qualifications and retirement trends. The previous surveys were conducted in January 2003 and January 2006. The results are used to assist the association in decisions regarding benefits, services and professional learning for members. The information has also served to inform the Ministry of Education and local school boards on issues and trends regarding the retirement of school administrators and issues that may arise.

The 2009 survey was re-designed to include three additional questions, allowing CPCO to gather qualitative data about

members' motivations and perceptions regarding the position of school administrator and the professional learning needs for the profession. Future surveys will tie this data to the professional learning needs of our members.

The latest census survey was conducted from January 2 to 23, 2009. The survey tool used was SurveyMonkey, which CPCO members have used on previous occasions. The invitation to participate was e-mailed to 1,922 members. Members who did not receive an invitation had opted out of the CPCO surveys, approximately 200 in total. The survey was completed in whole or in part by 1,520 members. The following are excerpts from the report. The full report is available on the CPCO website.

✓ Age Groups

The age of school administrators has changed slightly over time. There has been an increase in the number of administrators in the 36-50 age groups. The most significant decline has been in the 51-55 age bracket. From 2003 to 2009, the decrease was 10 per cent. Many administrators reach their 85 factor by age 55 in this age group and may retire at the end of the year in which they become eligible. The Ontario College of Teachers' statistics noted that as of 2007 fifty-six per cent of teachers with principal's qualifications were 50 or older.

School administrators are now beginning to span three generations:

- Baby Boomers (born between 1946 and 1964);
- Generation X (born between 1965 and 1976); and
- Net Generation (born between 1977 and 1997).

Age	2003	2006	2009
26-30	0	0.2	0
31-35	3.8	2.8	3.7
36-40	9.8	9.9	12.4
41-45	16.9	17.6	19.4
46-50	25.6	23.7	24.6
51-55	35.7	31.5	25.7
56-60	7.0	12.9	12.4
61-65	1.2	1.2	1.8
Over 65	0	0.2	0.1

This will not only have a potential impact on the type of professional learning required for different groups of administrators, but also on how we conduct business. Baby boomers have to learn about the new technologies while the net generation has grown up with technology and use it on a regular basis. The net generation will insist on a workload that allows them to maintain a work-life balance. Don Tapscott in his book, *grown up digital* describes the net generation as a generation that does not just take what is given to them. They will commit fewer hours a day per week to their jobs than the hours they see the boomer generation working. The net generation wants more flexibility in the way they work and they want to be more involved in the decision-making process. They will find top-down management challenging. They want to be part of the collaborative effort with all levels of management working together to find solutions to problems and to develop new initiatives. They will challenge the status quo and will not be passive when decisions are being made. Tri-level leadership will be very real for them.

The Learning Partnership (TLP) in its succession planning report to the Institute for Education Leadership (IEL) provided the following advice:

As the paradigm shifts towards a more balanced accountability framework, leadership training focused on collegial and collaborative approaches will need to take precedence. We have noticed an intergenerational difference in approaches to leadership. Younger, newly appointed administrators have expressed a clear preference for engagement and a more democratic work place. (p.15)

✓ Years in Administration

In each of the census surveys, more than 70% of the administrators have less than 10 years experience in the role and of these half have less than five years. The number of administrators with more than 16 years of experience has declined in each of the surveys suggesting that those administrators, who were appointed in the mid 1970s and have spent the bulk of their years in education as administrators are retiring.

When asked what motivated them to become school administrators, the following reasons were given.

- Sixty-one per cent indicated they wanted to make a difference, affect change or wanted a new challenge.
- Twenty-six per cent said it was a natural progression and they wanted to use their leadership skills.
- Twenty-two per cent were tapped on the shoulder by a mentor, colleagues or family encouragement.
- Seven per cent specifically cited servant leadership, a vocation and a belief in Catholic education as reasons.
- Two per cent of respondents said money was a factor.

Years	2003	2006	2009
Less than 5	39.5	36.6	37.1
6-10	31.6	35.0	35.6
11-15	15.6	12.7	17.4
16-20	9.3	9.4	6.1
21-25	2.7	3.2	3.0
26-30	0.8	1.1	0.5
31-35	0.5	1.1	0.1
Over 35	0	0.7	0.2

In their book, *Made in Canada Leadership*, Amal Henein and Françoise Morissette describe two types of leaders, accidental and innate. The accidental leader finds himself/herself in that role not because he/she wanted to be the leader but because of the circumstances. There was no one else to do the job or he/she believed passionately in a cause or a goal. In their study the authors found that two-thirds of the people they interviewed were accidental leaders, who had stumbled into their roles. The innate leaders are the opposite. They have a strong interest in leadership and feel that it is a natural fit. They know that they want to be leaders (pp. 60, 61).

The role of principals is important in identifying the accidental leaders amongst their staff members and encouraging these people to consider leadership roles. A leader is recognized by the number of leaders he/she leaves behind. Opportunities need to be provided for those aspiring to the leadership to engage in meaningful leadership experiences. There are more opportunities today for future leaders to develop their leadership skills in professional learning communities. Principals have the opportunity to mentor and coach these individuals and to nurture capacity building within the school community.

TLP in their research quoted the common mistakes most organizations make in undertaking succession planning as highlighted by the Conseil des ressources humaines du secteur culturel:

- failing to tell people they are being considered for a leadership role, so possible candidates leave before they are offered the job;
- underestimating the talent that exists within the organization to help with succession planning;
- being close-minded about who could fill a position;
- concentrating on specialized, not general competencies;
- waiting for potential candidates to identify themselves; and
- failing to offer adequate training and professional development.

The Ministry of Education and school boards will need to continue to support the ongoing training of mentors/coaches at the administrator level as well as for the aspiring leader. The Learning Partnership noted,

School boards that have a leadership talent management program in place and who adopt succession planning and leadership development practices at the school and district level will fare better than those who merely react to vacancies. (p. 11).

If we are going to attract the individuals best-suited for the administrative positions, they must also be provided with incentives to pursue this vocation.

When school administrators were asked for their opinion as to the barriers to becoming a school administrator today, the following were offered.

- Fifty-four per cent said the workload, amount of responsibilities and expectations are deterrents.
- Twenty-seven per cent indicated that the desire to spend more time with family rather than at work is a factor.
- Twenty-two per cent responded that the issues with the unions and job security (not being able to return to teaching with their seniority intact) are a problem.
- Twenty per cent cited the lack of respect and support from parents, the board and the Ministry as barriers.
- Fifteen per cent are concerned with the possibility of having to deal with legal issues and dealing with difficult parents and students.
- Twelve per cent said the job is too stressful.
- Nine per cent noted the lack of incentive from a monetary point of view; department heads sometimes earn more than vice-principals earn but have fewer responsibilities and spend less time on the job.

Barriers that make the position seem unattractive need to be addressed and solutions need to be developed collaboratively with all stakeholders in the tri-level model of leadership. The message that the principalship is a noble and worthwhile vocation must be clearly and persistently articulated to both the teaching and wider community.

The following is a sample of the general comments made by administrators regarding their profession.

- Immensely rewarding. A real privilege to be with such an incredible community. Tremendous learning opportunities within the school and board. Some pressure to be all things to all people, so knowing how to delegate and organize your day is a must.
- We have to deal with difficult situations regularly and it is important for us as members to know that we are receiving the necessary support from our respective senior administration and CPCO when in need. We should be aiming to attract good people to our jobs and they need to see that we are given due respect and support in our role.
- I love what I am doing but the time that is necessary to do a good job does not allow for much time with family.
- This vocation is wonderful. I love my staff and students. But the

stress of the level of responsibility is taking its toll. Individuals with a family...I don't know how they do it. I'm not taking time for myself and am concerned that my health is suffering.

- Despite the many challenges and increasing workload, I love my job, and I know I am making a positive difference in the lives of my students, staff and in the community. What a great profession!
- It is truly tiring and rewarding at the same time. I do not know for how many years I can do this. It is a heavy commitment, far beyond the classroom.
- Succession planning is a huge concern. It is the nature of the job people see us doing and most comments from teachers who we approach to consider a vocation in administration tell us they would never do this job. Something needs to change if we are going to attract strong, experienced people to the role of principal.

☑ Eligible year to retire versus intended year of retirement

Year of retirement	2009 – eligible	2009 – intend to
Undecided	No data	30.9
2009	18.0	3.5
2010	5.7	5.1
2011	5.2	4.7
2012	5.3	4.4
2013	5.4	3.4
2014	5.4	4.5
2015	4.6	4.3
2016	5.1	4.2
2017	6.0	3.1
2018	5.9	4.0
2019	4.9	3.3
2020	3.2	4.1
2021	3.3	2.4
2022	3.6	2.7
2023	3.4	2.4
2024	3.2	2.5

One of the considerations for school boards will be how much principal experience will be lost in any given year due to retirements. This will vary from board to board. More than 70% of administrators in 2009 have less than 10 years of experience in administration with more than half having less than five years.

Boards who wish to consider ways to retain school administrators beyond their retirement dates will have to address the following factors:

- adequate support for those in the role;
- provide them with opportunities that are challenging;
- remuneration that reflects the responsibilities and accountability of school administrators;
- discuss the type of school assignment that makes sense for the administrator;
- work/life balance; and
- ongoing mentoring opportunities for both principals and vice-principals, especially those new to the role.

Visit the CPCO website at www.cpco.on.ca to view the full census survey report.

Projections are difficult to make with almost one-third of members undecided as to when they will retire. However, it is clear that in the next five years approximately five per cent of members are eligible to retire each year and by the end of the decade at least half of the membership will leave. Most of the boomer generation will have left making room for the net generation to be promoted. Knowing they can retire at any time after reaching their eligibility allows school administrators the flexibility to leave when they feel ready, or have other employment or lifestyle opportunities to consider.

