



# **Census Survey Report 2009**

## **Implications for Succession Planning**

*April 2009*

**@ The Catholic Principals' Council of Ontario**

### ***CPCO Mission Statement***

*The Catholic Principals' Council of Ontario is called to leadership in Catholic education through service and advocacy with a commitment to gospel values.*

#### **The Catholic School Principal and Vice-principal**

Principals and vice-principals in the Catholic publicly-funded education system view their responsibilities through gospel values. As community leaders they advocate for their students and teachers. They promote participation by parish and family members in the broader community and they actively promote the benefits of Catholic education.

The Catholic school is called to nurture compassion, to serve others, respect the dignity of all persons and work for the common good. There are many distinctive purposes in Catholic education and the school leader plays an integral role in helping to achieve those purposes. Principals and vice-principals:

- Guide the learner to the person of Jesus Christ as the centre from which relationships with God, self, others and creation unfold
- Promote achievement of the Ontario Catholic School Graduate Expectations through our Catholic curriculum
- Nurture learning that is holistic and links moral and spiritual development to the life experiences of the learner

In the Catholic school religious traditions are honoured in various forms: prayer, school and class liturgies, celebrations, symbols, student art, bulletin boards, prayer tables and chapels. Catholic schools provide opportunities for students to express their faith through prayer services, stewardship, celebrations, school assemblies, volunteerism, social justice projects and fundraising for local, national and international charities.

The principal and vice-principal foster communion among the parish, the school and the home. The relationship is manifested in many forms including the celebration of the Eucharist and the Sacraments and support for families and children in need.

As members of Catholic learning communities, Catholic principals and vice-principals support faith-based curriculum and celebrations of success. They are called to model life-long learning and to be servant leaders.

Adapted from CPCO Discussion Paper on the *Role of the Principal*, October 2004

## Preamble

This is the third census survey conducted by the Catholic Principals' Council of Ontario to gather statistics on its 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 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 2009 census survey was conducted from January 2 to 23. The survey tool used to conduct the survey is 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 1520 members.

## Analysis of the Data

### Demographics

The majority of respondents are the elementary principals who make up the majority of the membership. The percentage of secondary vice-principals responding to the survey has increased in each of the last two surveys.

Position	2003	2006	2009
Elementary Principal	55.6	53.3	54.3
Secondary Principal	10.1	11.0	9.8
Elem. Vice-principal	16.6	14.5	14.3
Sec. Vice-principal	14.0	17.0	17.8
Board Administrator	1.0	1.7	2.0
Supervisory Officer	0	0	0.2
Other	2.6	2.4	1.5

### Gender

Between 2003 and 2009 there has been a five percent increase in the number of female administrators. Given that the ratio of female to male teachers especially at the elementary level has also increased significantly over the past 5 years, this increase is not surprising, given that the Ontario College of Teachers has noted a decline in the number of males entering the profession.

Gender	2003	2006	2009
Female	50.9	54.2	56.1
Male	49.1	45.8	43.9

## 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 had been 10%. 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. Ontario College of Teachers statistics noted that as of 2007 fifty-six percent of teachers with principal's qualifications were 50 or older.

School administrators are now beginning to span three generations:

- Baby Boomers (born between 1946 – 1964)
- Generation X (born between 1965 – 1976)
- Net Generation (born between 1977 – 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 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 doesn't just take what is given to them. They will commit fewer hours a day/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 won't 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)*

## Age at Time of Appointment

In the 2009 survey respondents were asked to indicate their age range at the time of appointment. The percentages across the different categories were for the most part within a few percentage points. The approximately 15% who were appointed in the 31-35 age category would have at the least 5 years of teaching experience and at the most 12-13 years. The expertise of the individuals will vary regarding: number of different grades taught, number of school experiences and credibility with staff they supervise.

For CPCO this has further implications as to the types of services, such as mentoring and coaching, curriculum and instructional leadership skills, members may need at the beginning of their careers in administration.

Members were asked what additional services in professional learning and member benefits would assist them in their role as school administrator. Some of the topics included:

- In-service for new administrators, mentors
- Instructional leadership
- Legal issues including safe schools
- Dealing with conflict and difficult people
- Retirement workshops
- Time management – work/life balance
- Networking opportunities

Age	Elementary Principal	Elementary Vice-principal	Secondary Principal	Secondary Vice-principal
26-30	3.1	0.9	3.4	1.9
31-35	15.1	14.4	14.1	16.4
36-40	25.5	21.8	27.5	24.6
41-45	28.2	26.9	20.1	22.8
46-50	15.9	22.2	19.5	20.1
51-55	8.4	10.6	12.8	11.6
56-60	3.4	3.2	2.0	2.2
61-65	0.5	0	0.7	0.4

## Years in Education

The majority of school administrators have more than 10 years experience in education, with 60% between 16 and 30 years. The number of administrators with more that 25 years experience has dropped in the 2006 and 2009 census surveys. There has been a slight increase in the number of members who have over 35 years of experience in education. The percentage of educators having more than 30 years experience has dropped slightly (2.6%) since the 2006 census. This data will have greater relevance for succession planning in individual boards.

Years	2003	2006	2009
Less than 5	0	0.1	0.1
6-10	2.8	2.7	2.7
11-15	12.8	12.0	12.9
16-20	16.2	18.5	23.0
21-25	22.1	21.5	23.7
26-30	26	25.0	20.0
31-35	17.7	16.8	13.7
Over 35	2.3	3.4	3.9

## 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 5 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.

- 61% indicated they wanted to make a difference, affect change or wanted a new challenge
- 26.5% said it was a natural progression and they wanted to use their leadership skills
- 22% were tapped on the shoulder by a mentor, colleagues or family encouragement
- 7% specifically cited servant leadership, a vocation and a belief in Catholic education as reasons
- 2% 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 they wanted to be the leader but because of the circumstances. There was no one else to do the job or they 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 mentor/coaches at the administrator level as well as 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.

- 54% said the workload, amount of responsibilities and expectations are deterrents
- 27% indicated that the desire to spend more time with family rather than at work is a factor
- 22% responded that the issues with the unions and job security (not being able to return to teaching with their seniority intact) is a problem
- 20% cited the lack of respect and support from parents, the board and the ministry are barriers
- 15% are concerned with the possibility of having to deal with legal issues and dealing with difficult parents and students
- 12% said the job is too stressful
- 9% noted the lack of incentive from a monetary point of view – department heads sometimes make more than vice-principals 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 involved. 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 this profession despite the many challenges and struggles.
- 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.
- I love what I do. Each day is unique and it is sometimes difficult to articulate what it is we actually do as we do it at breakneck speed. However, the workload, professional learning opportunities and school-based issues are sometimes overwhelming. It is great to connect with colleagues who understand.
- 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.
- The province needs to recognize the key role administrators play in the education system. They need to stop paying lip service about how valued we are and listen to our concerns and compensate us appropriately.
- I have been in this role for a short period of time and although it is a huge learning curve, and extremely busy, tiring and demanding, I absolutely love this job.
- 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.

### Intended Year of Retirement (No statistics for 2003)

The number of people who are undecided as to when they will retire has increased in 2009. The members that have indicated that they will retire in the next four years has decreased from 2006. This drop is indicative of the fact that the largest group of the Baby Boomer generation were poised to retire between 2007 and 2009 with smaller groups leaving between 2010 and 2012.

Year	2006	2009
Undecided	21.2	30.9
2009	7.3	3.5
2010	6.6	5.1
2011	5.8	4.7
2012	5.3	4.4
2013	4.4	3.4
2014	3.2	4.5
2015	3.1	4.3
2016	3.4	4.2
2017	2.9	3.1
2018	4.6	4.0
2019	2.8	3.3
2020	2.1	4.1
2021	N/A	2.4
2022	N/A	2.7
2023	N/A	2.4
2024	N/A	2.5

Members were asked what some of the factors were that would determine when they would retire. Many responses included more than one factor.

- 44% cited finances as an indicator including their financial status, mortgage and pension
- 40.5% indicated that their health and/or the stress level of the job would affect their decision
- 32% said that job satisfaction would impact on their decision including whether or not they would be transferred to a new school, workload and degree of enjoyment in the position
- 25.5% mentioned the status of their children, post-education and their ages as being factors
- 9% listed their 85 factor or the eligibility of their spouse to retire
- 8.5% said that post-retirement opportunities for employment would play a part in determining their retirement date

Statistics from the CPCO Long Term Disability (LTD) program indicate a shift in the last few years in the type of illness most commonly affecting members on sick leave. In the early part of this century, cancer was the most common form of ailment. Today cancer is the diagnosis for approximately 30 percent of members on LTD. Psychiatric disorders (stress, anxiety) now account for 50 percent of the cases on LTD. This finding is not surprising given that principals feel more and more stressed trying to deal with increasing workloads at the school level with less supports. Many members have commented on a lack of work/life balance as a result.

**Eligible year to retire versus intended year of retirement**

<b>Year of retirement</b>	<b>2009 – eligible</b>	<b>2009 – intend to</b>
Undecided		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

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 5 years approximately 5% 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.

One of the considerations for school boards will be how much principal experience will be lost in any given year due to retirements. Again 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 5 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
- Ongoing mentoring opportunities for both principals and vice-principals especially those new to the role.

### Administrative qualifications

The percentage of members who have supervisory officer's qualifications has been consistent at just over 12% of respondents.

Qualification	2003	2006	2009
Supervisory officer	12.3	12.5	12.6
PQP II	85.7	86.1	85.8
PQP I	1.2	0.7	0.8
Temporary Letter	0.2	0.1	0.1
Other	0.6	0.5	0.6

### Post-graduate Degrees

Only one percent of members have taken a doctorate degree. The number of members indicating that they have a master's degree has steadily declined in the past 6 years. The majority of school boards requiring candidates to have a master's degree or to have started a master's degree before applying for an administrator's position are found in the Greater Toronto area. Two-thirds of candidates to the Principal's Qualification Program qualify with two specialists (usually religion and special education) rather than a master's degree. (See PQP statistics below.) This suggests that in some areas there are fewer candidates available to take the supervisory officer's qualification program because of the lack of qualifications.

Degree	2003	2006	2009
Doctorate	1.2	0.5	1.0
Masters	68.0	60.4	55.8

Respondents indicated that the cost of earning a master's degree is a burden on young people who are still dealing with student loans, mortgage payments and raising young families. The time required to earn a master's degree takes away from family time as well as does the role of the administrator. It was suggested by some members that school boards need to do more to assist potential leaders in acquiring this qualification.

### Interest in taking the Supervisory Officer's Qualification Program (SOQP)

The percentage of school administrators interested in becoming qualified to be a supervisory officer is consistent with the percentage of members who already have the SOQP. This position is often not seen as an attractive alternative for many members as it further removes the individual from meaningful relationships with students and staffs.

Interest	2006	2009
Not interested	65.8	64.4
In the process	4.4	3.8
Have SPQP	11.3	12.4

## What our Principal's Qualification Program (PQP) statistics are telling us.

### PQP Statistics 2007 & 2008

#### Panel

Panel	Winter 08	Summer 08	Fall 08	Winter 07	Summer 07	Fall 07
Elementary	57.0	65.5	68.8	55.4	65.2	70.8
Secondary	41.0	29.3	30.0	38.6	28.6	22.1
Both	2.0	5.2	1.3	6.0	6.3	7.1

The ratio of elementary candidates to secondary candidates is indicative of the number of positions available in the two panels. The fluctuation of numbers is usually indicative of the accessibility to leadership pools or the perceived number of positions that will be opening due to retirements.

#### Gender

Gender	Winter 08	Summer 08	Fall 08	Winter 07	Summer 07	Fall 07
Female	60.0	67.2	52.5	66.3	72.3	70.5
Male	40.0	32.8	47.5	33.7	27.7	29.5

Women outnumber men by a ratio of 3:1. This is reflective of the teacher population where we continue to see a decline in the number of males engaged in teaching.

#### Experience in Education

Experience	Winter 08	Summer 08	Fall 08	Winter 07	Summer 07	Fall 07
5-7 years	20.0	16.4	16.3	16.8	17.9	17.9
8-10 years	30.0	22.4	22.5	22.8	25.0	28.6
11-15 years	13.0	25.0	33.8	20.8	26.8	18.8
16 plus yrs.	37.0	36.2	27.5	39.6	30.4	34.8

On average teachers with 16 plus years of experience usually make up about a third of the class and are probably in Generation Y. The 5-7 year experience group is the beginning of the Net Generation who want to make sure they have the qualifications needed should the opportunity arise for advancement.

#### Requirements to qualify for PQP

Qualifications	Winter 08	Summer 08	Fall 08	Winter 07	Summer 07	Fall 07
Master's Degree	34.0	32.8	38.8	31.7	31.3	32.7
2 Specialists	63.0	64.7	55.0	63.4	58.9	61.1
1 Specialist & ½ Master's	3.0	2.6	6.3	5.0	9.8	6.2

As noted earlier in this report, two-thirds of candidates satisfy the entry requirements for PQP with two specialists. Candidates with a master's degree usually come from the boards where this qualification is a requirement for consideration to the leadership pool or to being appointed.

When asked what motivated them to take the PQP the candidates provided the following reasons:

- Considering moving into a leadership role
- Being tapped on the shoulder by senior administration
- Encouraged by colleagues
- Desire to further their vocation through Catholic leadership
- Next logical step in their careers

## Conclusions

From the research and data collected it is evident that all partners in education will need to work together to find solutions to meet the challenges of succession in our schools. Given the cultural shift we are experiencing as a new generation is posed to move into leadership, meaningful solutions will only be found if the current leadership is willing to look at the situation with a new lens.

1. To attract teachers to the vocation of school administrator barriers need to be addressed, in particular:
  - a. Ability to try on the role of school administrator and to be able to return to teaching without loss of seniority if desired;
  - b. Remuneration that reflects respect for the role and the responsibility it carries;
  - c. Workload that allows for a work/life balance; and
  - d. Recognition of and support for the role of the school administrator.
2. Attention to the leadership model needs to be addressed. The tri-level model of Catholic leadership as outlined in *Putting Ontario's Leadership Framework into Action* has to become authentic.
3. Marketing of the role of school administrator in a positive light, highlighting the benefits of this vocation. All partners including the board, its principals and CPCO need to work together to celebrate the positive impact of this role on the lives of children.
4. Collaboration between boards and CPCO to provide principals and vice-principals with professional learning opportunities according to their needs at the different stages in their careers.

Respectfully Submitted

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