Leadership Success in Schools: Planning, Recruitment, and Socialization

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ABSTRACT: This article presents findings from an exploratory study that compared and contrasted leadership succession planning in two large Ontario school districts with focus on three themes: (a) leadership succession planning, (b) recruitment and selection, and (c) professional and organizational socialization of school administrators. Among the findings from the two comparative cases were: (a) a need for financial support for leadership preparation, (b) a need for structured recruitment teams, (b) a need for structured administration preparation and training programs, (c) self-selection, (d) a need to examine policy for rotating leaders, and (e) a need for internal and external promotion.

Due to the mass of retirements of school administrators and the impending shortage of qualified candidates with experience to move into these leadership positions school districts across North America are faced with the challenge of recruiting and preparing candidates for the administrator role. This trend is predicted to accelerate over the next several years (Archer, 2004; Educational Research Services, 1999; Educational Research Services, National Association of Elementary School Principals and National Association of Secondary School Principals, 1992; Institute for Educational Leadership, 2000; Molinaro & Drake, 1998; Wallace Foundation, 2003). Within this climate of exiting school leaders a concerted effort to attract and prepare applicants to the field of school administration is essential (Browne-Ferrigno, 2003). Accordingly, it is critical that school districts plan for leadership succession, continuity and advancement at all levels to provide more comprehensive learning opportunities for leaders (Association for Supervision and Curriculum Development, 2000; Gutherie & Saunders, 2001; Newton, 2001). Various studies demonstrate that in order to meet new challenges and changing expectations for the administrator's role, aspiring and practicing school administrators need ongoing support and training to obtain new knowledge and a wide range of new skills (Jackson & Kelley, 2000; Kelley & Peterson, 2000, Normore, 200b). Among the support is a need for district financial commitment for leadership development programs that will likely draw more candidates to fill the school leadership positions (ERS, 1999).

This study compares and contrasts leadership succession planning processes in two large Ontario school districts. Both school districts were selected due to: (a) similarity in size, (b) same stage of succession planning, and, (c) same policy context. A cross-case analysis design was adopted

to explore leadership succession and development. The foundation for this study was an a priori conceptual framework of variables derived from a review of principal preparation literature. Three themes provided the structure for shaping the inquiry: (a) leadership succession planning, (b) recruitment and selection of school administrators, and (c) school administrator socialization processes. For the purposes of this study leadership succession planning involves the policies, structures, and decisions made by school districts to place school leaders over time. Recruitment and selection refers to the processes and strategies school districts engage to attract future leaders. Socialization refers to how individuals are prepared and trained for the evolving leadership roles.

Conceptual Framework

Leadership Succession

Leadership/executive succession is of tremendous importance to those who work in schools. Some of the seminal research conducted in this area (e.g., Blood, 1966; Carlson, 1961; Dill, 1960; Stout, 1973) and more recent inquiry (e.g., Crawford, Carlton, & Stengel, 2003; Hargreaves, Moore, Fink, Brayman, & White, 2003; Hargreaves & Fink, 2004; Hart, 1993; Muth & Barnett, 2001; Normore, 2001, 2002; Rothwell, 2001; Townsend, 2003) conclude that leadership succession is an interactive process that can be very disruptive, and its results can be ineffective and dysfunctional if the new leader does not become an integrated and respected member of the social system whose leadership has received popular affirmation. Carlson (1961) asserted that succession often disrupts lines of authority and communication, disturbs power and decision-making systems, and generally upsets the organization's normal activities. In contrast, disruption can have a positive impact on a school such that performance is substantially enhanced (Hart, 1993). As this process develops and unfolds in school settings, an administrator undergoes a group membership boundary passage resulting in varying degrees of acceptance and legitimacy by the school's faculty (Hargreaves et al., 2003; Johnson, 2001; Normore, 2004a; Pounder & Merrill, 2001).

In the past, organizations focused succession planning efforts on the preparation of high leadership potential individuals (Blood, 1966). While some school boards engaged in succession planning via career-bound successors (those who are active in preparation for the administrative position), others focussed on place-bound successors (those who take more time to prepare for leadership positions and are considerably less progressive in views about schooling) to lead their institutions (Carlson, 1961). Carlson asserted if school districts choose leaders from within the organization, the central tendency of his/her performance would be to stabilize what exists, whereas for leaders who are chosen outside the containing school system, the central tendency of his or her performance would be to alter what already exists. Today, school organizations are learning that the focus must be not only on high potential individuals, but also on the context of these individuals and the value they can add to the school and district leadership team (Leithwood, Riedlinger, Bauer, & Jantzi, 2003; Normore, 2001). Succession planning can help school districts in several ways: (a) by engaging senior management in a disciplined review of leadership talent, (b) guiding development activities of administrative teams, (c) bringing selection systems, rewards systems and leadership development into alignment with the process of leadership renewal, (d) assuring continuity of leadership, (e) avoiding transition problems, and

(f) preventing premature promotion of principals through professional development (Johnson, 2001; MacMillan, 1996).

During succession a successor who possesses knowledge about social influencing processes and skill in applying that knowledge can have a substantial impact on the outcomes of his or her own succession practices and experiences (Barnett, 2003; Hart, 1993; Johnson, 2001). Various researchers (e.g., Begley, 2000; Ogawa, 1994; Pieter, 1994) maintain that district leaders can assess their current practices by allocating funds to design flexible preparation processes that support leaders undergoing succession and lead to outcomes that advance district policies and goals including: (a) training and support specifically designed to assist leaders in a new assignment, (b) recognizing that they face challenges common to major transitions, (c) acknowledging that a unique mix between the leader and the school will give rise to the outcomes of the succession, and (d) preparing the leaders for the impact the school will have on them as well as the sustainable impact they hope to have on the school (Hargreaves & Fink, 2004).

According to Fullan (1997), districts can capitalize on the expectations for change and sustainability that succession brings to implement new programs and work toward the improvement of schools by shaping and expanding the professional orientation, knowledge, and skills of those in leadership roles (Archer, 2004; Fullan, 1993, 1997; Hargreaves et al., 2003; Hargreaves & Fink, 2004; Hart, 1993; MacMillan, 1996). To avoid potential succession problems school districts can implement well-planned strategies during the stages of recruitment and selection, and provide effective socialization experiences for enhanced development.

Recruitment and Selection

Effective recruitment and selection of school administrators continue to be one of the more challenging human resource tasks in educational organizations. This challenge is due, in part, to the inexact science of attracting, screening, and identifying candidates to fit the complex leadership needs of schools today (McCarthy, 1999; Pounder & Merrill 2001; Pounder & Young, 1996; Young & Castetter, 2003). In 1992, a special report from the National Association of Secondary School Principals (NASSP) called for "all stakeholders to unite in a rational attack on the common problems associated with the recruitment, identification, selection, preparation, and development of school administrators" (p. 34). Since that call major efforts have resulted in the development of a knowledge and skill base for the preparation of potential school administrators for the role (Castetter & Young, 2000; Johnson, 2001; Muth & Barnett, 2001; Rebore, 2001; Robinson, 2000; Seyfarth, 1999; Young & Castetter, 2003).

In the past, attracting teachers into the ranks of school administrators was relatively easy because educators saw administration as a normal part of career advancement and usually occurred in mid-career (Fullan, 1997; Hargreaves & Fullan, 1999; Winter & Dunaway, 1997). Teachers no longer see administration as a way to improve their salaries, prestige, or respect among other colleagues (ERS, NAESP & NASSP, 2000; Pounder & Merrill, 2001; Seyfarth, 1999). Many highly qualified, competent, and talented teachers dismiss careers in administration because they do not want to sit in an office all day, hassle teachers, discipline students, work with unhappy parents, or push paper S all activities frequently associated with the stereotypical role of the

school administrator (Rebore, 2001; Renihan, 1999). Many individuals do not consider the fact that alternative images of school leadership are possible. Until some of those alternatives become better accepted and understood, there may always be a problem of individuals pre-screening and self-selecting (ASCD, 2000; Cascadden, 1998; Chirichello, 2001; Rebore, 2001; Wallace Foundation, 2003).

Recruitment practices must be extensive and aggressive and focus on placing and keeping an effective and satisfied administrator (Castetter & Young, 2000). Common methods of recruiting administrators range from internal searches, referrals, and contacting employment agencies, to advertising vacancies with college and university placement services (Young & Castetter, 2003). Most school districts have two pools of candidates from which to recruit; internal and external (Pounder & Merrill, 2001; Rebore, 2001). Factors that affect recruitment and selection practices range from job complexity and size of school district, to fringe benefits, increase or decrease in student population, and poor remuneration as it relates to responsibilities and the expectations of the job (Castetter & Young, 2000; Renihan, 1999; Robinson, 2000; Tekeste, 1996). The selection process requires a choice of best candidates to fill the administrative positions (Benson, 2001; Pounder & Merrill, 2001; Renihan, 1999; Tekeste, 1996). Selection procedures and interviews are usually structured around information relating to the work history of the candidates, their education and training, motivation, and maturity (Rebore, 2001; Seyfarth, 1999; Tekeste, 1996). Some of the selection procedures include resumes, pre-screening interviews often done by telephone, employee testing, reference checks, and consulting services (Rebore, 2001).

Socialization

Socialization involves the processes by which administrators learn the skills, knowledge, and dispositions required to perform their role in an effective manner (Bennis; 1985; Merton, 1963). Bennis asserts that socialization involves a complex set of human relationships within an organization that includes all the people in it and their relationships to each other and to the outside world. The preparation of school administrators involves both professional and organizational socialization (Hart, 1993).

Professional socialization involves acquiring knowledge, skills, and behaviors through which values and norms of the profession are internalized and a professional identity is established (Daresh, 2000; Pounder & Young, 1996). Begley and Cambell-Evan, (1992) assert that professional socialization generally begins in the pre-appointment phase of a school leader's education career and continues into early post-appointment growth and on-going development. It requires dialogue, collaboration, and mentoring by an experienced professional to serve as a guide (Daresh, 1997; Greenfield, 1985). Pre-appointment professional socialization includes mandatory and voluntary courses for certification; first-hand experience of leadership and management tasks; modeling and social learning by observing both good and bad leadership; and deliberate mentoring by some existing school leaders who see importance in their role in preparing future leaders (Barnett, 2003; Muth & Barnett, 2001). Formal preparation is important for developing the technical knowledge and skills that administrators require to be successful (Greenfield, 1985; Normore, 2002, 2004a). Devoting more time, energy and resources to programs that focus on meaningful content in a form consistent with good principles of adult education is one promising suggestion for improving socialization experiences (Jackson &

Kelley, 2002). On-the-job leadership activities are viewed as the most helpful of all socialization activities (Greenfield, 1985; Normore, 2002).

Organizational socialization is specific to the educational context. Each school is comprised of a complex array of people, policies, processes, and priorities to which school administrators must adjust (Greenfield, 1985a; Hart, 1993; Leithwood et al., 1992). As teachers make the transition to school administrator so does the emergence of new socialization experiences (Browne-Ferrigno, 2003; Ortiz, 1982). When preparing for their new administrator roles, aspiring administrators begin to take on a different role as an educator. Consequently, the need to be re-socialized becomes crucial and a new professional identity unfolds. The need to fit into the immediate work environment and organizational norms tend to replace those learned during professional socialization. There are mediating influences on administrator's socialization such as work setting, culture and relationships with peers, superiors, district policies and procedures, formal training, and outcomes. Experiences can range from carefully planned training and induction programs to unplanned, on the job experiences (Daresh, 1997) and include workshops, formal courses, job shadowing, principal meetings, peer coaching, and mentoring (Hart, 1993; Sergiovanni, 2001). Induction experiences and on-going professional development opportunities are key to organizational socialization (Barnett, 2003; Hall & Mani, 1992; Leithwood et al., 1992; McCarthy, 1999). This suggests that the profession adopt a longer-term view of the preparation and development of school leaders that extends not only into the induction period but provides planned socialization experiences each time a new leadership assignment is made (Daresh, 2000; Pounder & Young, 1996).

The lack of leadership practicality in university courses and certification programs are often admonished and criticized (Begley, 2000; Bredeson, 1996; Leithwood et al., 1992). Universities and school districts can use a variety of bridging strategies to provide aspiring administrators with practical administrative experience including internships (Muth & Barnett, 2001), and knowledge to help them succeed in the principalship prior to their first position. It is naVve to believe that pre-service training or even out-of-district in-service programs will provide aspiring administrators with all they need to know about how to be an effective leader in a particular school district (Begley, 2000; Bredeson, 1996; Daresh, 2000). School districts, therefore, must continue training new and veteran administrators with a variety of supportive induction activities to help them continue their professional growth as school leaders for the new millennium.

Research Methods

This study adopted a cross-case analysis design. The design was selected because of the exploratory nature of the inquiry (Merriam, 1998; Yin, 1994). Qualitative procedures were used to collect data, including semi-structured interviews, observation/fieldnotes, and document analyses. Data were gathered during the 2000-2001 school year. Consistent with standards associated with naturalistic inquiry, all data were coded, and the constant-comparative method was used involving inductive analyses simultaneous to data collection (Glaser & Strauss, 1967; Strauss & Corbin, 1998).

Data Collection

The primary data collection procedures included 12 individual semi-structured interviews (six in each district) with district directors, superintendents, and staff development officers. Six focus groups were conducted (three in each district) with aspiring and practicing school administrators. Supplementary sources included documents, anecdotal data, and reflections. The use of a combination of observations, interviewing (both focus group and individual) and document analysis, allowed for validation and cross-checking of findings (Merriam, 1998; Patton, 1998). Data were collected over a period of eight months during 2000-2001.

Data Analysis

Progressive data analysis was conducted during data collection to determine the need for further probes and gave direction for follow up in subsequent site visits. Interviews were transcribed. All data (interviews, observations, and documents) were coded by listing themes and concepts which related to the conceptual framework. Multiple readings yielded themes and patterns within and across cases. Constant comparison of the data to the framework, revisiting the literature as well as reorganizing and combining subsets of responses produced overarching categories. The combination of three data sources and four perspectives allowed for triangulation.

District A

District A is a large school district serving approximately 67,000 students in 100 elementary schools and 20 secondary schools. There are approximately 6,000 employees in total including 3,500 teachers and 250 school administrators. District A is a mix between urban and rural, industrial and agricultural, inner-city and suburban. The school system is organized into seven geographical areas with schools operating in a "family of schools" (a secondary school and feeder schools) under the supervision of one superintendent (district documents)

Nature of Leadership Succession Planning

Leadership succession planning was considered a district priority and had a budget allocated for leadership development. As a senior administrator explained:

We're in dire straits for new leaders. It's a situation of supply and demand where the demand far outweighs the supply…We have funding for training any people who are interested in becoming principals. It's a priority for our district now. We have ample numbers of administrators to fill vacancies in the secondary schools but we lack numbers in the elementary schools…due to the number of schools in our district.

Leadership succession and development is overseen by the superintendent of operations. Two education staff development officers (former principals) delivered, coordinated, and facilitated leadership development activities. The overall philosophy of leadership development promoted and supported a growth model in developing a leadership for learning organization (observations, interview transcripts, district documents). Following a leadership study in 1998, District A created a four-stage leadership development model including: (a) early identification,

(b) preparation, (c) initial promotion, and (d) renewal. All stages of the Leadership Effectiveness Across District (LEAD) program focused on professional development, personal skills, management skills, and leadership skills. Expectations for school leaders were categorized into six dimensions including: interpersonal leaders, instructional leaders, community leaders, principle-centered leaders, professional development leaders, and manager/operational leaders. Principals were expected to be change agents who understand the school culture and curriculum. They were charged for ensuring teacher growth and development. Collaboration and community involvement were essential.

Administrators were rotated every three to five years based on the belief that school communities profit from administrators who have had leadership experiences in a variety of school settings. Decisions about rotation were made at the system level. According to a district administrator:

We believe it's necessary to train our school administrators on systems level so when we move our principals from one school to another every 3-5 years we do it with the intent of keeping them alert of the diverse experiences they can have from one school to another.

There was no consultation with either the school administrator or the school community nor were there planned opportunities for predecessors and successors to have discussions because of the uncertainty of school and time of placement. According to one principal:

This deliberate shifting of school administrators sometimes has a negative effect on our schools because we may be in the process of a change innovation, or involved with a mentee, when suddenly we are transferred before we have finished what we were previously doing.

While guidelines were in place for external recruitment, the tendency was to identify and select internal candidates only. Recent leadership shortages have necessitated hiring from outside (senior administrator).

Recruitment and Selection of School Administrators

Future administrators were identified in two ways: self-selection and/or nomination by principals or supervisory officers. A principal stated:

We are expected to work on developing leaders in schools …some decide themselves, some are in interim roles…not qualified on paper but might be interested…the principal is expected to tap somebody on the shoulder who she thinks might be a good candidate…most of them have little experience as teachers…recruitment is an exciting way to get qualified or at least to see if you'd be interested in getting qualified.

Each year in the early fall an orientation session was scheduled to recruit candidates interested in the vice principal pool. Interested teachers with formal qualifications were required to participate in a three-month Administrator Preparation Program to be considered for the vice principal pool. The preparation program was offered in the fall and again in the spring. A team of practicing administrators and staff development officers facilitated the program which included workshop sessions, job shadowing, and development of leadership portfolios. Workshops focused on

leadership expectations, school culture, change research, and interviewing skills (observations, interviews). Structure and guidance were provided to assist aspiring administrators as they developed their portfolios in preparation for the interview process. Upon completion of the preparation program, candidates were interviewed and only accepted into the pool once letters of recommendation were completed by principals and supervisory officers (district documents, interviews). Advertisement for administrative positions was general rather than specific. Only people in the vice principals' pool could apply when positions were available. Interview teams created a short list and successful candidates waited to be placed. Unsuccessful candidates were given a debriefing and encouraged to re-apply. When there are not enough successful candidates, the district conducts a second round of interviews or places individuals in acting assignments (interview transcripts). Vice-principals did not apply for principal positions. Instead, they were contacted by the district office and placed when a vacancy was available. A great deal of frustration was experienced because of how vice principals and principals were placed. Time frames were always short, there was no consultation, and no opportunity for convening about the new assignments. A principal expressed the general frustration: "Sometimes there is way too short notice given to principals about preparing to lose a teacher or the vice-principal. One day's notice…that's it!" A recently appointed principal reported, "There is never any time to experience the new culture in the new school prior to placements."

Professional and Organizational Socialization

Formal professional activities included university accreditation involving graduate level course work, the provincial Principal's Qualification Course Part 1 and 2, and completion of the district's Administration Preparation Program. Informal activities included mentoring, study groups, networking, conferences, school based leadership experiences, and conducting meetings and staff development sessions. A number of organizational activities were available to support the continued learning of leaders including seminars and sessions on a range of leadership topics. Policies and structures were outlined, and annual performance reviews provided guidance for administrators (interviews).

Induction was loosely organized in the district. Induction activities were offered but a structured formal program was not available to support new administrators. Newly appointed vice-principals indicated they had no entry strategy in place and were uncertain what to expect. Newly appointed vice principals were mentored during their preparation program, but newly appointed principals were not assigned a formal mentor.
The view from the district office and from the school level was contradictory:

First and second year vice-principals and principals have a chance to sign up for the new administrator training…or renewal. Seconded administrators deliver a practical seminar series for new administrators on tough discipline issues, dealing with parents, helping teachers get ready for the parent interviews, on helping teachers with classroom management, to their own leadership to the wellness piece to you name it, it's included in their training (District administrator).

We need a structural program in place that can help us once we are in the administrative role. This program helps us to get there but once we're there we are pretty much on our own. I wasn't

taught how to deal with my entry into the role. There was no induction in place…at least not formally (vice-principal).

Administrators found mentoring, job shadowing, leadership experiences (on-the-job training), and interim leadership roles of greatest value. A vice-principal explained: "There is some deliberate mentoring happening. I had fabulous mentors. I wouldn't be as comfortable with my job as I am if it weren't for my mentor." Formal course work in the university training and preparation and components of the Principals Qualifications Course were considered least valuable by many while others considered this training adequate. The participants were served by several universities in the vicinity which lead this researcher to believe that experiences were not singular. A common concern raised by many focused on the lack of practical activity faced by practicing school leaders and an over-emphasis on theoretical underpinnings of what ought to be happening in schools. As one newly assigned vice principal indicated: "There is too much theory, and very little practice-oriented scenarios. We need to hear more from practicing school administrators about the daily realities of schools."

District B

District B is a large school district with just under 63,000 full-time students in 100 elementary schools and 15 secondary schools. There are approximately 6,000 employees in total including 3,500 teachers and 200 school administrators. The majority of schools are in urban areas; 25% of the schools were in small, rural towns. The school system is organized into five geographical areas and 15 family schools with a superintendent responsible for each area (interview transcripts and district documents).

Nature of Leadership Succession Planning

Leadership succession planning was considered a priority for staff development in this district. A budget was allocated for leadership development and planning and overseen by the superintendent of leadership development. In 1998-1999 the local executive council and senior leaders decided the need for a steering committee to oversee the leadership development plan under the direction of a superintendent. Several practicing school administrators and the superintendent of leadership development (steering committee) developed a comprehensive leadership development model intended to influence the current and future leadership in the system. The model focused on expectations for effective leadership in the district including: (a) leader - change and instructional leadership, (b) learner - initiates and sustains life-long learning, (c) manager - management tasks and provides a collaborative work environment, (d) communicator - employs all forms of communication effectively including attending to trends and issues in the school and community cooperatively and in a caring manner. The steering committee solicited other administrators within the district and formed five leadership development teams: (a) Recruitment, (b) PAR Selection (Position of Added Responsibility), (c) Training, (d) Professional Development, and (e) Professional Growth Portfolio. The general leadership philosophy developed in District B is that quality leaders develop quality schools (documents, interviews).

The district had a systematic rotation policy of moving principals every three to five years. According to district administrators, decisions about rotation were made at the system level with

the philosophy that rotation keeps administrators alert and abreast of change initiatives from school to school. There was an absence of consultation with either the school administrator or the school community. A principal explained:

It becomes difficult to make plans after three years since we don't know if we will be in the same school the following year. I could be involved in a mentoring initiative with a vice-principal and suddenly I am told I have to transfer to another school. My 'mentee' is disappointed and has to start the same process under a new principal. More time for mentoring is needed to help candidates prepare for the selection process as well as more time needed for practicing administrators to prepare to release their 'mentee' to take on a new position. A few days to prepare are not considered adequate.

Hiring was done only internally. No written policy was in place for recruiting externally. A senior administrator stated: "Since funding and time are invested for training our own we have no reason to recruit from outside…it's important that our school administrators understand the district culture." While no written policy on hiring external candidates existed a principal explained: "We may need to consider adopting a policy about hiring from outside since we do not have adequate numbers in the elementary vice-principal pool."

Recruitment and Selection of School Administrators

Potential future school leaders were recruited in two ways: self-selection and, or nomination by principals or supervisory officers. A senior administrator explained:

What we're really trying to do is encourage people who are at a relatively early stage in their careers to start looking at those types of positions…knowledge, skills…so when you're in that position you can be effective. Oftentimes, when I visit a school somebody will ask me about the position of school administrators by arranging to meet with me. We discuss the mentor idea and that really seems to attract them. We also expect our principals to recognize potential candidates for our leadership development programs and to encourage them to apply.

A structured procedure was in place for recruitment overseen by the recruitment team who was responsible for arranging regular workshops (one in fall, one in spring) on recruitment for current school administrators and invited the teacher's federation to be part of the process. The selection process was conducted by the PAR Selection team whose responsibilities were to: (a) provide information sessions and workshops for candidates as part of the selection process; and (b) identify characteristics required for successful administrators in the context of learners, leaders, managers, and communicators for each stage of administrative leadership: PAR applicant (i.e., candidate), vice-principal, principal. The preparation and training program was aligned with needs identified by practicing school administrators and offered on a needs basis with no specified dates. The training team worked in conjunction with the professional development team and the professional growth portfolio team. Developing and enhancing leadership competencies were provided by ongoing professional development opportunities. Candidates were expected to work with their administrators on their own time to develop their professional growth portfolios. Upon completion of the preparation program, candidates were interviewed and selected for the vice-principal pool pending letters of support and

recommendation from their principals or area superintendent. Announcements for administrative positions were done generically rather than for a specific school. Only individuals in the vice-principal pool could apply when these vacancies were announced. A second advertisement was announced within the district if the vice-principal pool was inadequate. A senior administrator noted:

We will advertise a second time if the pool is short. The investment for training programs costs money and time. It would defeat the purpose of the training program if we were to go outside our district. Promoting from inside ensures knowledge of the school district organizational culture, district policies and goals. We will promote unqualified candidates to interim positions in consultation with the teacher's federation and Ontario College of Teachers…under the condition that these candidates have teaching experience and will complete their administrator qualifications. We will occasionally hire individuals from outside as teachers first…and then promote them to administrators within a year.

As in District A, an interview team (administrative council comprised of superintendents and administrators) created a short list and successful candidates waited for placement. When successful candidates were in short supply, individuals were placed in interim positions. Unsuccessful candidates could reapply during the next interview schedule. Newly assigned administrators were seldom given the opportunity to get familiar with their newly assigned schools. Administrators experienced disenchantment and seldom had any input into their new assignments. Prior to a new placement, there was uncertainty as to which school in the district a new assignment would be made and at what time. Despite senior administrators knowing which vice-principals and principals planned to retire or leave the district at the end of each school year there was no planned opportunity for predecessors and successors to have discussions about placements. As a recently assigned vice-principal indicated, "Consultation is needed…and more time to prepare for the transition from one school to another…I was given a key and a 'sink or swim' nod…that was it." A different perspective from a senior administrator indicated consultation:

We try and not place spouses in the same school…we tend to avoid placing individuals who may have conflicts with one another…for example, perhaps one of our vice-principals prefers to not be placed in a school with a principal he doesn't get along with…we look at those things.

Professional and Organizational Socialization

Formal professional activities included Principal's Qualification Course Part 1 and 2, university requirements involving graduate level courses, and completion of the district's administration training program. Informal activities included mentoring, professional dialogue and networking, and on-the-job leadership experiences. A number of formal activities were made available including district-wide workshops focused on the nuts-and-bolts of daily operations, contractual agreements, leadership topics, as well as policies and procedures. Informal activities included opportunities to build relationships with super-ordinates, assessment of personal and organizational values, and facilitating reflective activities. Entry strategies and induction opportunities lacked structure to support newly assigned administrators (interview transcripts).

Mentoring and job-shadowing were integral components of their preparation but as indicated by one vice-principal, once appointed "it's birth by fire." A recently appointed principal explained: "When I was vice-principal I learned much about social learning from an ineffective principal…I learned more about what not to do than I did about what to do." One experienced principal indicated that he generally had positive entry experiences. Administrators found mentoring, leadership experiences prior to placements, acting assignments, administration preparation program, and the practical components of the Principal's Qualifications Course to be of greatest value for their leadership roles. A vice-principal noted: "The hands-on leadership experience was definitely the most valuable for me." University training and theoretical components of the Principal's Qualifications Course were considered the least value. These two socializing influences were noted by many participants as having little impact on how well they performed their tasks as school administrators.

Discussion: Cross-Case Analysis

In terms of context both school districts were similar in terms of size, policy, configuration of schools, and number of employees. Both were in the same province. In this section findings are linked to the literature to frame conclusions and implications.

The Nature of Leadership Succession Planning

A crucial element in preparing school leaders for success is individual school districts. Research indicates that when school districts are willing to invest funds in succession planning and development it will likely lead to a qualified pool of candidates for leadership positions (Bennis, 1985; Leithwood et al., 1992; Pieter, 1994). Leadership succession planning was considered a priority in both districts. Both districts made financial commitment for leadership succession and development. The secondary level pools had adequate numbers of candidates in the vice-principal pools. A shortage of candidates for the elementary leadership pools continued to be problematic due to the high number of elementary schools in each district.

Both districts developed a leadership model to support the preparation and training of all candidates and practicing administrators. Similarities in the process for leadership development programs included an early assessment of administrative needs of the school districts and effective leadership identifiers (i.e., curriculum and instruction) for future and current administrators (Hart, 1993; Johnson, 2001; MacMillan, 1996). A noted difference existed in the structure and composition of the leadership development teams. Staff development officers coordinated and facilitated the delivery of leadership development in District A. In District B, the superintendent of leadership succession coordinated the administration preparation program with the assistance of five teams made up of school administrators.

Both districts engaged in a provocative practice of deliberately rotating school administrators every three to five years based on the philosophy that regular rotation kept administrators alert and helped in the transplantation of change initiatives from one school to another. As supported by Johnson (2001), this trickle down hypothesis may hold ground but it lacks any comprehensive dialogue or even planned inquiry related to the purpose or potential outcomes of regular rotation. One could argue that these two school districts promoted a managerial response to school

leadership, particularly in challenging schools where renewal activities require visionary, sustained leadership over time. This could explain why fewer elementary teachers apply to the vice-principal pools. Elementary schools, even more than other levels, are generally connected through community that would be disrupted by a stream of principal shifts over time (Daresh, 2000)
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Research indicates that most school districts have two pools of candidates from which they recruit: internal and external (Castetter & Young, 2000; Pounder & Merrill, 2001; Rebore, 2001). Both districts had promotional policies in place for internal candidates only. It was widely believed that promoting internally is favored over external appointments because of knowledge of school district culture. District A had guidelines in place, though rarely practiced, for recruiting externally. District B did not have any policy in place but sometimes hired qualified administrative applicants from outside the districts as teachers first and promoted them to administrator positions within one year. Since the leadership shortage posed issues for filling vacant positions, both districts were considering external recruitment.

Recruitment and Selection of School Administrators

Personnel in both districts indicated before any contact was made with candidates an assessment of current and future staffing was conducted. According to the literature, recruitment and selection activities begin shortly after staffing needs are determined (Castetter & Young, 2000; McCarthy, 1999; Seyfarth, 1999; Van Berkum, Richardson, & Lane, 1994). While District A offered a "one shot deal" recruitment session in the fall, District B had a recruitment team in place that facilitated two annual recruitment sessions – fall and spring. Although self selection was practiced it was common practice in both districts for experienced administrators and area superintendents to identify and encourage potential candidates (Cascadden, 1998; Chirichello, 2001), to apply for administrative pools at an early career stage rather than in mid-career (Ortiz, 1982). The selection process for both districts was similar. The literature reiterates that selection is generally structured around the work history and leadership experiences of the candidates, portfolio, formal education and administrative training (Rebore, 2001; Tekeste, 1996). If the vice-principal pools were short in supply, both districts permitted unqualified aspiring administrators to take positions as interim vice-principals. These aspiring administrators were required to enrol in the Principal's Qualifications Course while in an acting role. Other stipulations for this practice included consultation among district office, teachers' federations and the Ontario College of Teachers.

A noted difference existed within the structure and guidance offered by the selection teams. Staff development officers and a team of practicing administrators in District A guided candidates in activities for selection that included structure for portfolio development. District B's selection process was conducted by the PAR Selection team who coordinated all selection activities with candidates for selection to the vice principal pool. It was left to candidates and their principals to complete the portfolio at their convenience. Without the completion of the portfolio, candidates could not apply for the vice-principal pool. Such a practice begs to question whether or not more candidates would qualify for the vice-principal pool if more structure and guidance were made available.

Both districts advertised vacant administrator positions similarly. Only individuals who successfully completed the preparation programs and were part of the vice-principal pools qualified for openings. Selection and short listing were based on numbers that were in the pool and placements were made accordingly. Vice-principals and principals did not apply for positions. Once they were in these roles they were automatically in the principal pool. Prior research supports these findings (e.g., Ross, 1989).

Professional and Organizational Socialization

A wide body of literature suggest that socialization experiences and structured opportunities for interaction with colleagues promote growth of aspiring and practicing school leaders (Begley & Cambell-Evan, 1992; Bennis, 1985; Hall & Mani, 1992; Kaye, 1995; Leithwood et al., 1992; Seyfarth, 1999). A difference existed in the structure of the administration preparation program in the districts. District A had a structured preparation program that included training, professional development, and a process for developing the professional growth portfolio. One team of staff development officers and practicing administrators facilitated and coordinated all activities in a structured three month course format every fall and spring. District B had a loosely structured administration preparation program in place. No particular course was developed where candidates were required to meet regularly. Rather, project teams comprised of practicing school administrators worked in conjunction with one another and were responsible for training, professional development activities, and developing professional growth portfolios.

Both districts offered similar professional development and training activities to aspiring and practicing administrators. As supported by previous research (e.g., Daresh, 1997; Greenfield, 1985; Hart, 1993; Leithwood et al., 1992; Normore, 2004a), both of these districts provided a range of formal activities (i.e., such as training programs, mentoring, and job-shadowing to informal activities (i.e., in-services, opportunities for relationship building with subordinates and super-ordinates, on the job experiences and discussions about policies, procedures and priorities). However effective or appropriate socialization activities seemed from a central office perspective, a significant number of candidates and newly appointed administrators in both districts felt unprepared for the first year in the administrative role. While mentoring was made available during the preparation stage once appointed a new vice-principal generally felt alone (Daresh, 2000; Kelly & Peterson, 2000; McCarthy, 1999; Pounder & Young, 1996; Wanous, 1980).

As documented in previous research, mentoring, on-the-job leadership experiences and the administration preparation program were considered to be most valuable in preparing the school administrators for their role (Leithwood et al., 1992; Daresh, 2000; Normore, 2002). Only a few participants in both districts in this study spoke favorably about formal university preparations while most were disenchanted. Many formal university courses and various components of the Principal's Qualification Program were considered of little value to the administrator role. Although a full consensus was not reached these two socializing influences were noted by many participants as having little or no impact on how well they perform their tasks as school administrators (Begley, 2000; Bredeson, 1996).

Conclusions and Implications

Expectations, guiding principles, structure and responsibility are aspects that guide and influence decision-making through all stages of the leadership succession planning process. Clear expectations for leadership are central and must be understood consistently among all school leaders and aligned with future strategic direction. Aspiring and practicing administrators systemically need to know what leadership knowledge, skills, attitudes, behaviour and roles are expected and supported in the district. This is especially important as the role of the school administrator continues to change and expand. The mission of succession planning also needs to be articulated. Some districts adopt the philosophy of internal promotion, some support external promotion, while others endorse a combination of both. The overall organization of the succession planning process should be clear outlining the organizational and support structures, timelines, events and assignments. Some districts appoint the responsibility to a superintendent and organize centrally, while other districts employ a shared leadership approach.

In order to attract and recruit potential leaders principals and superintendents need to recognize leadership qualities among teachers and to encourage them to pursue and apply for administrative roles. The application process must be aligned with the selection process and include any contractual considerations that may hinder and, or support appointments. Emotional and financial support for a structured leadership preparation program is a key part of leadership succession planning. Leaders participate in both professional and organizational socialization experiences in order to learn about leading. These processes involve understanding culture, norms and values of the new schools, and district and consist of a range of formal and informal leadership for learning activities. Well-structured formal induction programs are important to support new administrators in the transition from a teaching role to an administrative role and should be considered an integral part of ongoing professional development.

Implications for Educational Practice and Policy

Need for collaboration and support. There is a need to shift focus from the leadership of the principal alone to a more inclusive form of leadership, to the collaborative empowerment of all school systems administrators. While it may seem to run contrary to the districts' mode of operation (i.e., how they move people without input) it seems appropriate for district offices to foster school and district cultures that are collaborative and support an atmosphere of inquiry. Even though some of the training structures have been used in the past (i.e., mentoring, job-shadowing) and have frequently been unsuccessful, a need to determine what those barriers were that were prohibitive must be addressed and work towards their elimination.

Relevance of academic training programs and certification courses. Training programs need to be re-configured around the redefined role of the school administrator. Higher standards and greater rigor should also be required for the accreditation of administrator training programs which will be responsible for delivering the upgraded and re-configured training for the administrator role. Potential leadership candidates may not be positive about that change and will require a balanced perspective. Considering the practice of internal hiring only, the same practice might be opposed to a program that produces students that question the present status quo. Universities and districts need to form symbiotic relationships when designing and implementing leadership preparation

and certification programs so common realities are addressed effectively.

Leadership development. Districts engaged in leadership succession planning might consider an issues series as part of induction tailored to the needs of newly appointed school leaders. Given the findings from previous and current research, this leadership series should include ongoing workshops and seminars for first year principals, explore succession and also include educational, policy and management practices.

Implications for Future Research

Based on findings from this study there are two specific implications for future research. Few empirical studies exist at this time on school district based leadership succession (Crawford et al., 2003; Hargreaves et al., 2003; Johnson, 2001; Townsend, 2003). Considerably more research-based inquiry is needed before a full-blown theory of leadership succession planning can emerge.

Leadership succession success. Specific steps taken by two school districts are highlighted and perceptions of participants are reported in this study. Still, much in the individual plans is yet to unfold before long-term effects can be ascertained. Finding relevant information requires searching under other labels and categories of literature such as effective school districts, educational governance, transformational leadership, and organizational learning. In particular, a need for research that clearly conveys the links between leadership succession and more generalized school district leadership practices will have to be addressed and how it fits in the organizational governance and procedural structures within a school district.

Rotating administrators. Further investigation on the policy of systematically rotating leaders is needed. An approach would be to use these qualitative data findings to develop a survey that could be administered to a broader range of districts and compare the findings to more generalizable data. Is this a desirable component of a leadership succession process? Is rotation a strategy related to succession of district administrators that impedes succession processes at the school level or does the process create opportunities for emerging assistants to be promoted? Can administrative rotation be shown to have positive effects on student learning outcomes?

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