A CONCEPTUAL FRAMEWORK FOR SUCCESSFUL SUCCESSION OF GENERATION Y TEACHERS THROUGH SHARED LEADERSHIP

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─**Abstract**─

Educational systems are experiencing a global leadership crisis. A large number of school principals represent *Baby Boomers Generation*, that is, individuals born between 1946 and 1964. These principals are increasingly retiring from leadership and principal positions and there are a fewer applicants for the job. Therefore, it is critical that education systems develop the leadership capacity of teachers able to assume formal leadership positions as the current cohort of principals retire. Currently, the teaching population is made up Generation Y (Gen Y) teachers, that is, individuals born approximately between 1981 and 1995. This is the generation that must be groomed and nurtured for future leadership position in schools. Shared leadership can be an effective strategy to develop these aspiring leaders group belonging to Gen Y into leadership position. This theoretical study offers shared leadership strategies that can be considered for development of Gen Y teachers into leadership positions.

Key Words: *Shared leadership, succession, framework, generation Y, teachers*

JEL Classification: I20, I21, I29

1. INTRODUCTION

There is increasing evidence of a potential leadership crisis developing in many schools worldwide (Bennett et al., 2011; Fink, 2010; Pont, Nusche & Hopkins, 2008). Many of the principals currently leading schools represent *Baby Boomers Generation*, that is, individuals born between 1946 and 1963 (Howe & Strauss, 2000). These individuals are entering exit age of their career as principals. Moreover, research suggests that there is a lack of willingness from classroom teachers to take on school leadership roles (Bennett et al., 2011; Fink, 2010; Pont, Nusche & Hopkins, 2008). As a result, many schools are currently experiencing a high turnover of a pool of capable leaders due to retirements and fewer applicants for the job. In a review of the literature located in the United States of America (USA) and Europe, Phillips et al. (2003) noted a shocking statistics of principals who are on the verge of retiring. For example, the study conducted by the National Association of Secondary School Principals (NASSP) in the United States, reported that the average age of principals in 1993 – 1994 was 47.7 with 37% older than age 50, while 53.6% ranges between ages 40 and 49, and only 9.5% was younger than age 39 or younger (Fink & Brayman, 2006). In addition, half of the school districts surveyed in 2000 reported that there was a shortage of qualified principal candidates (Fink & Brayman, 2006). The report indicated that these shortages of principal candidates cut across at all levels, that is, elementary with 47%, junior / middle with 55%, and senior high with 55% (Fink & Brayman, 2006).

A similar pattern was also depicted in a study conducted by Ontario Principals' Council in Canada which showed that close to 60% of principals and 30% of deputy principals in elementary and secondary schools will retire by 2005 (Fink & Brayman, 2006). Moreover, the study reported that by 2010, more than 80% of principals and about 50% of deputy principals will retire (Fink & Brayman, 2006). Estimated forecast of the study was that 1900 Ontario schools out of about 3200 in the English component of the public system will have new principals by the year 2014. A similar challenge of school principals entering retirement age or leaving the sector was also reported in a study conducted by Gabrielle Wills, an economist at the Stellenbosch University in South Africa. The study reported that more than 7000 or about 1400 a year of new principals are required to replace retiring principals in South African public schools between 2012 and 2017 (Wills, 2015). Internationally, Hargreaves et al. (2008:71) noted that "in many countries, almost half of the current generation of school leaders is due to retire within the next few years, creating significant challenges to leadership recruitment, stability

and effective continuity". As literature has shown, the entire leadership team of many schools belong to the *Baby Boomers* cohort approaching retirement at the same time. Then, the question arises: How can school systems deal effectively with the predictable challenges that are currently facing schools? Dempter et al. (2011) believe that due to a fewer people showing interest in leading schools as well as other key leadership roles, an urgent systematic approach to finding leaders from within the schools or teaching profession must be implemented to usher the next generation of leaders. This view is also supported by Zepeda et al. (2011), who suggest that succession will be the life blood of educational systemic success, considering that school systems can no longer rely on an appropriate number of principal applicants. Therefore, school systems must consider succession processes that create pools of potential leaders from within.

Sharing the same view, Hargreaves & Fink (2006) emphasised that the current school leadership must create a culture of leadership development across the departments within the schools. This leadership development provides an established pool of talented individuals to draw from when a need arises. As Thompson (2010:98) writes, "this is a call to grow your own leaders". Therefore, in order to respond effectively to the generational gap facing the education systems, it is important for the current school leadership to develop the leadership capacity of teachers able to assume formal leadership positions as current principals retire. However, Rhodes & Brundrett (2009) note that, it is critical first to understand the characteristics and leadership needs of the generation of teachers currently in the teaching profession. Currently the teaching population is made up of Generation Y teachers. These are the individuals born between 1977 and 1996, while other studies say they were born between 1977 and 2000 (Howe & Strauss, 2000; Wilson & Gerber, 2008). This generation has unique features and characteristics which differed completely with Baby Boomers Generation, that is, the individuals born between 1946 and 1963. However, this is the generation that must be groomed and nurtured for future leadership position in schools. Therefore, the current school leadership is urged to prepare succession plans that resonate with the views and opinions of Gen Y teachers. Understanding their characteristics will enable the current school leadership to effectively transfer knowledge and leadership skills necessary to empower these generation of teachers for school leadership positions. Therefore, conceptual underpinnings which guided this study included literature which focused on shared leadership as a framework for teacher leadership, and understanding of characteristics possessed by Gen Y teachers. This article begins by discussing these conceptual

underpinnings and concludes by proposing a framework for successful succession of Gen Y teachers through shared leadership.

2. CONCEPTUAL UNDERPINNING OF THE STUDY

2.1 Shared leadership as a framework for teacher leadership

Historically, school leadership has been associated with one person in a position of formal authority. When teachers talked of school leadership they thought of a principal. Quarantined in their classrooms, teachers believed that the principal was responsible for finding and delivering the medicine to cure whatever ails the school. In this case, the principal is seen as a hero endowed with qualities that they perceived they did not possess. This can potentially lead to the development of a mentality of dependency among the school stakeholders whereby no event is complete without the principal and no decision proceeds without his/her involvement (Duignan & Bezzina, 2006). The problem with idealised leadership theory is that it focuses on a formal leadership position, such as that of a school principal, and sees leadership as a function of personality, ability, and traits with less of an emphasis on skill, knowledge, and effort of others (Lambert, 2003). Such a stance constitutes a myopic view of describing leadership and that can exacerbate problems that schools are currently experiencing with regards to leadership succession and recruitment. It would seem, however, that leadership should no longer be described in the context of leadership philosophies and management practices that were developed mainly to focus on the principal as the leader or manager of the school (Duignan & Bezzina, 2006).

In the last decade, there has been a significant shift in the way leadership is conceptualized and defined. The elusive way in which leadership is defined and practiced in school or organization has expanded notably (Harris, 2003; Feeney, 2009; Spillane et al., 2001). One common characteristic of the redefinition of leadership is the location of leadership among people, rather than in the particular skills or dispositions of one leader (Feeney, 2009; Lambert, 2003). Defined in this way, leadership provides a sense of purpose that pulls teachers into the work of leadership as a form of learning with others to improve the practice of teaching and learning (Lambert, 2003). The key notion in this definition is that leadership is about learning together and, constructing meaning and knowledge collectively and collaboratively (Lambert, 2003). The key emphasis is on learning together, sharing and creating processes and conditions that encourage everyone in the school community to be effective learning resources for each other (Lambert,

2003). Sergiovanni's (2001) concept of *leadership density* is also particularly relevant here. Sergiovanni argues that high leadership density means that a larger number of people are involved in the work of others, are trusted with information, are involved in decision making, are exposed to new ideas and are participating in knowledge creation and transfer. In such a situation, a larger number of members of the organisation have a stake in the success of the organisation and all members are potential leaders.

Sharing the same view, Lambert (2003:1) notes that leadership involves opportunities "to surface and mediate perceptions, values, beliefs, information, and assumptions through continuing conversations; to inquire about and generate ideas together; to seek to reflect upon and make sense of work in the light of shared beliefs and new information; and to create actions that grow out of these new understandings". These are the core of leadership. And this paradigm of defining leadership as such is known as shared leadership. The key notion in this definition is that leadership is about learning together. However, the most widely cited definition of shared leadership comes from Conger & Pearce (2003:1) which states "A dynamic, interactive influence process among individuals in groups for which the objective is to lead one another to the achievement of group or organizational goals or both". Conger & Pearce added, "This influence process often involves peer, or lateral, influence and at other times involves upward or downward hierarchical influence" (Conger & Pearce, 2003:1). These authors further added that it is also important to recognize the terms which are used interchangeably with shared leadership such as collective and distributed leadership (Conger & Pearce, 2003).

Now let us take a fresh look at how a shared leadership capacity should be generated in schools. Shared leadership, as both concept and practice, should be reinterpreted to include the contributions of all who work in a school. Leadership should not be viewed as the property of one individual or a group. It must grow out of the shared vision, beliefs and efforts of a committed group of teachers who have a sense of belonging, a sense of being valued members of their school community and a deep commitment to collective action for whole-school success (Crowther et al., 2002b). School principals, especially, needed to be bold enough to freely share and distribute leadership responsibilities among teachers and other key stakeholders. In this way, they are more likely to create the culture where key stakeholders, especially teachers, students and parents, willingly take responsibility for the leadership of their school community (Duignan & Bezzina, 2006).

Shared leadership has been widely studied for its ability to build sustainable change within the educational setting (Elmore, 2000; Harris, 2003). The use of shared leadership helps to motivate staff members by instilling confidence and expressing trust that members are skilled enough to participate in the decision making process of the organization (Duignan & Bezzina, 2006). These teacher leaders are increasingly being utilized to aid school administrators in the work of the school (Katzenmeyer & Moller, 2001). Harris (2003) contends that if we are serious about building professional learning communities within and between schools then we need forms of leadership that support and nourish meaningful collaboration among teachers. However, this will not be achieved by clinging to models of leadership that, by default rather than design, delimits the possibilities for teachers to lead development work in schools. (Harris, 2003).

2.2 Understanding Characteristics of Generation Y (Gen Y) teachers

Although no exact definition of the Generation Y exists, however, it is argued that, it is the generation that born approximately between 1981 and 1995 (Wong & Wong, 2007). Other sources say Generation Y are those individuals born between 1977 and 1996, while others say they were born between 1976 and 2000 (Howe & Strauss, 2000; Erickson 2008; Karefalk et al., 2007). The beginning and ending dates defining the parameters of the Generation Y vary from the beginning year 1982 to the ending year 2003 (Mokoena, 2012). This cohort of individuals is known by different names, which include: Generation-D, Net Gen, Newmills, Millennial, Nexters, Generation Next, Echo Boomers, and Digital Generation (Coetzee et al., 2015; Wilson & Gerber, 2008). This is the largest generation that has ever entered the workforce and it was estimated that they comprised approximately over 50% of the full-time employees by the year 2010 (Bureau of Labour Statistics, 2004).

This generation grew up in an environment that is significantly different from what prior generations experienced. They grew up in an environment that possesses unprecedented levels of media saturation and technology. As a result of their development within this environment, Gen Y has arguably developed a number of distinctive characteristics. They communicate more through technology than in person; they blog, Google, tweet, chat and use Wikipedia to acquire sources of information (Wilson & Gerber, 2008). They are dissatisfied with disconnected or technologically inferior environment. Another characteristic of Gen Y employees is that they tend to be highly educated and educationally minded; they typically attribute their success to their educational opportunities
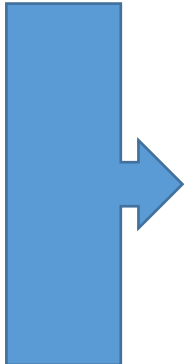
(Mokoena, 2012). A large proportion of Gen Y entered university soon after high school, completed their undergraduate degrees and in many cases moved forward with a Masters or Doctorate degree (Mokoena, 2012). Professionally, Gen Y employees are creative, innovative, and self-confident (Mokoena, 2012). They are technically able, highly informed and confident (Johns, 2003). They like to share what they have learned through collaboration in small groups, and they are eager for their work to make a difference and contribute to a larger movement for positive change (Carter & Carter, 2001; Shaffer, 2008; Yuva, 2007). In a study conducted for the Educational Research Service, Marx (2006) found that Gen Y teachers are committed to addressing long-standing social issues including diversity and greater inclusiveness in the workplace.

In the work environment, Gen Y desires leadership that can be admired and trusted (Wong & Wong, 2007). Admired behaviour is a powerful force that can transform a school into a true learning community where all employees feel appreciated and know that they can count on the goodness of intention when administrators make decisions that can affect their lives (Mokoena, 2012). Again, they tend to favour an inclusive style of management, dislike slowness, and desire immediate feedback about performance (Smith, 2004). They also prefer flexibility in work schedules, a high quality work environment, young talent programme to aid the career development of new employees (Mokoena, 2012). According to Cleveland (2006), Gen Y employees typically desire relationships with their supervisors and colleagues, attractive salaries, opportunities for development, recognition for high quality work, and exposure to challenging assignments, flexible working schedules, and casual dress in the workplace. According to Martin & Tulgan (2004), Gen Y is likely to perform best when its abilities are identified and matched with challenging work that pushes it fully. Speed, customization, and interactivity are features likely to help keep Gen Y focused (Martin & Tulgan, 2004). Gen Y employees generally want to get ahead in their careers in a short period of time. Thus they seek opportunities for leadership and to make a difference in their career (Rebore & Walmsley, 2010). As can be seen by the lists generated in this discussion there are many characteristics to cover about Gen Y. However, understanding the characteristics that the Gen Y possess may influence their retention in the workplace.

3. CONCEPTUAL FRAMEWOK FOR SHARED LEADERSHIP SUCCESSION

Figure 1 presents a conceptual framework that links principles of shared leadership to characteristics of Gen Y teachers as identified in the literature study provided above under the heading "conceptual underpinning of the study". Five key strategies that could support shared leadership succession of Gen Y were identified. However, identified key strategies are but a few considering vast range of literature on the characteristics of Gen Y and broad concept of shared leadership. Discussion of the shared leadership strategies together with the characteristics of Gen Y provided the basis for implementing shared leadership succession of Gen Y teachers.

Figure-1: Strategies of shared leadership succession for Gen Y teachers

		Shared Leadership Strategy	Emphasis for Gen Y Teachers
Principles of Shared Leadership	1	Shared Leadership Strategy	Emphasis for Gen Y Teachers
	2	Establish a shared vision and set goals	Involve Gen Y in developing a vision and setting goals
	3	Encourage shared leadership	Empower Gen Y to assume leadership responsibilities
	4	Create a positive and supportive environment for collaboration (with focus on technology)	Provide professional development opportunities that involve collaboration and technology
Generation Y Characteristics	5	Support career advancement	Realise that the career ambitions and loyalties of Gen Y teachers differ from those of previous generations

Adapted from Albion and Gutke (2009) and Behrstock and Clifford (2009)

The discussion below attempts to integrate theory into practice for implementation of successful succession for Generation Y teachers into leadership positions.

3.1 Strategy 1: Establish a shared vision and set gaols

A key important role of any organisational leader is to establish a vision for the organisation and see it through. This is a collective effort that requires inputs from all stakeholders in the organisation. One of the characteristics of Gen Y employees is that they want to be involved in decision making process of the organisation. More specifically, they want to be involved in developing a vision and setting goals for the organisation. They want their voices to be heard and their individuality to be appreciated (Behrstock & Clifford, 2009). McNeil and McClanahan (2005) noted that, when teachers are involved in decision-making, motivation and commitment are likely to be increased, which may result in change being implemented more effectively. In a research study conducted by Mokoena (2012) on first year BEd students to establish their expectations of teaching as career choice, some of their expectations included involvement in the school decision-making processes. Therefore, school leaders can use the opportunity to revisit their school visions and revise or re-commit as appropriate by making sure they involve Gen Y teachers and incorporates their thoughts and ideas. Phillips & Addicks (2010) noted that Gen Y employees are likely to stay with the organisation when they see their ideas are being implemented. Therefore, for a realisation of a successful succession of Gen Y teachers into leadership position, the current generation of principals must endeavour to embrace their creative views and opinions with an aim to advance school's vision.

3.2 Strategy 2: Encourage shared leadership

As indicated in the literature review, leadership is a shared endeavour (Harris, 2003; Feeney, 2009; Spillane et al., 2001). The role of the principal must be shared to the point when principals leave the job they have left behind "teacher leaders" who can provide on-going continuity to the school and district where effective teaching and learning will always be the highest order (Normore, 2004:8-9). Therefore, Gen Y teachers must be afforded opportunities to assume leadership responsibilities from the start of their career. Providing opportunities to share leadership should target areas where Gen Y teachers have expertise, such as developing websites for the school or developing and designing creative instruction material, organising events, assisting with uses of educational technology, participating in committees (Behrstock & Clifford, 2009). This approach will strengthen relations with colleagues from other generations, who expect young teachers to prove themselves through competency before they can assume any leadership position (Behrstock & Clifford, 2009). However, Gen Y

teachers do not subscribe to the idea that they must prove themselves before they can assume leadership roles. Gen Y teachers are confident, and many would not hesitate to take leadership roles or transitioning to a different job in the field after only three or four years as a teacher (Behrstock & Clifford, 2009).

In his research studies on student teachers expectations of teaching as a career choice in South Africa, Mokoena (2012) found that one of the expectations expressed by many student teachers was that they expect to be part of the school management team within five years of starting teaching. And, if this does not occur they may feel frustrated and consider leaving the profession. Therefore, the current generation of principals must find ways to empower Gen Y teachers and encourage them to assume responsibilities. For successful succession of Gen Y teachers into leadership position, school systems should embrace their confidence and commitment in order to empower all for leadership. Shared leadership subscribes to distributed leaderships ideals than to traditional autocratic leadership styles (Lambert, 2003, 2004; Harris, 2003). Therefore, de-emphasis of hierarchies embraces ideals and values of Gen Y teachers (Chatterji, 2009).

3.3 Strategy 3: Create a positive and supportive environment for collaboration

Members of Gen Y grew up with parents and teachers who closely monitored and supported them to help them succeed in their chosen pursuits. Even when making career choices, Gen Y members often consulted with their parents and other role models whom they trusted and admired (Yuva, 2007). When they enter the teaching profession, Gen Y members look to principals and other school leaders to fulfil that advisory role. As result, Gen Y prefers working in an environment where they can share ideas, collaborate and learn together than an environment in which autocratic leadership structures are still in place (Lambert, 2003). Shared leadership is understood as "reciprocal, purposeful learning in community settings" (Lambert, 2006:239). It involves providing opportunities for people to work together collaboratively. An improving school includes Gen Y teachers who are active in constructing meaning and collaborating in mutual enquiry and learning (Mansour, 2011). Gen Y teachers are so committed to achievement and to changing the world for the better. Therefore, the current generation of school principals should encourage knowledge sharing among technologically savvy Gen Y teachers through discussion forums and blogs and any other online collaboration (Koudal & Chaudhuri, 2007; Richardson, 2008). Again, Gen Y teachers should be encouraged to share their technological skills and knowledge,

find time in between to talk to them and, where necessary mentor them. Gen Y teachers value mentoring relationships and value leadership from those who guide and coach them (Cruz, 2007). Working with and through others, and enabling others to lead is a key element of a shared leadership and one that Gen Y teachers are likely to support fully (Duignan, 2008; Harris, 2004; Thorman, 2007).

3.4 Strategy 4: Support career advancement

Among the most important factors driving Gen Y retention are opportunities to develop and advance in their career. Gen Y wants to see opportunities for advancement and for personal and professional growth in the next few months (Behrstock & Clifford, 2009). Capacity building could be one of the incentives to motivate Gen Y teachers to remain in the profession, providing them with the means of developing careers paths that are in line with their own interests and ambitions (Lambert, 2003; Behrstock & Clifford, 2009). Traditional professional development experiences may not meet the needs of Gen Y teachers. As Fink (2010:71) indicated, "Existing leadership models developed by older generations are incompatible with the values and need for a life work balance of Gen Y". Therefore, when arranging capacity building, the current generation of principals should focus on opportunities for teachers to work together on collaborative activities that can enhance their development. This view is supported by Slater (2008) who indicates that the capacity building principal creates a climate of enthusiasm and flexibility, where teachers feel invited to be at their most innovative, work together and give their best. Therefore, succession planning that includes opportunities for collaboration, and diversity of experiences will support shared leadership succession of Gen Y teachers (Chatterji, 2009). The current generation of principals need to model these core leadership practices to support the development of shared leadership across the school (Lambert, 2004).

3.5 Strategy 5: Celebrate achievements and value individuals

Literature studies describe Gen Y as individuals who are emotionally needy and constantly seek approval, praise, validation, entertainment and excitement in the workplace (Crumpacker & Crumpacker, 2007; Jonas-Dwyer & Pospisil, 2004; Hira, 2007). Sharing the same view, Richardson (2008: 2) indicates that "these are children who received trophies for finishing in 8th place". Therefore, organisations should support this desire and praise them when appropriate. Ricketts & Rudd (2002 cited in Albion & Gutke 2009) noted that within a shared leadership approach, individual contributions and achievement should be celebrated.

Diversity of opinions should be embraced and opportunities for sharing of diverse views should be supported (Busher, 2005; Harris, 2003; Lambert, 2003). Supporting the same view, Duignan & Bezzina (2006) argue that individual strengths and weakness can be balanced through shared leadership approaches. Creating an environment in which individual achievements are acknowledged and supported, such approach is seen to be supportive of Gen Y beliefs and also matches neatly with shared leadership principles.

5. CONCLUSION

As generational group known as *Baby Boomers* approach retirement, it is important to develop a pool of future leaders who will take on school leadership roles when the current cohort of principals retire. Currently, the teaching population is made up Generation Y (Gen Y) teachers, that is, individuals born approximately between 1981 and 1995. This is the generation that must be groomed and nurtured for future leadership position in schools. Shared leadership was identified as an effective strategy that could be employed to facilitate this challenge of shortage of principals. Using relevant literature review, five strategies as illustrated in figure 1 were identified and subsequently provided direction for implementing shared leadership succession of Generation Y teachers. Although these strategies have yet to be studied and tested rigorously for their effectiveness in supporting and grooming talented Gen Y teachers into leadership positions, however, they may hold promise for school administrators hoping to recruit potential leaders from their teaching ranks and empower them with the aim to take on leadership roles when they retire.

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