Attitudes and Intentions of New Zealand Educators about Preparing For and Succeeding in Educational Leadership Roles: Implications for National Leadership Development Strategy and Professional Associations

Reynold Macpherson

Abstract: *This paper explains why New Zealand's Professional Leadership Plan 2009–2010 (PLP) will not be able to address the growing shortages of qualified, trained and experienced educational leaders needed in school and early childhood education. It reports an international literature review and a survey of the preferences of 495 New Zealand educators regarding preparatory (pre-service) and succession (in-service) leadership professionalisation strategies. Most respondents believe that the quality of system management, inadequacies of funding and support services, and poor teacher productivity are the major impediments to effective educational leadership in schools. Conversely, most also believe in the efficacy of learning leadership 'on the job'. It is concluded that the PLP is more likely to result in continued amateurism through serial incompetence than evidence-based leadership and professionalisation. It is also concluded that school leadership responsibilities need to be redefined, redistributed and better rewarded, and that the nation needs to invest in a more sophisticated professionalisation policy and infrastructure. To this end a learning framework of nine preparatory and nine succession strategies is proposed, with 16 services to be delivered by a new peak body of professional leadership associations.*

Introduction

The National Review of Preparatory and Succession of Educational Leaders for Aotearoa/New Zealand[1] reported here was triggered by concerns over the impact of age demographics in the school teaching workforce and major system expansion in early childhood education (ECE). Disproportionate numbers of educators will need to be prepared

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in order to fill leadership roles through the 2010s in primary and secondary schools and in ECE. Baby Boomers born from 1945 and currently serving as leaders in primary and secondary schools will turn 65 from 2010 and presumably retire from or before then. Prior studies (Grey 2004; Collins 2006; Daniel 2006; Galvin,2006; Brooking 2008a, 2008b, 2008c; Macpherson 2009a, 2010a) show that accelerated promotion and turnover can be expected in all leadership positions in both sectors, raising concerns about both the quality and quantity of supply and the nature of New Zealand's educational leadership development policy and provisions.

It will be shown below that the demographic and turnover factors of supply are well understood in the Ministry. Actual capacity-building in systems, however, tends to be mediated by qualitative factors, particularly the attitudes and intentions of potential and current leaders in middle and senior management roles and in institutional and system-management positions. At the same time, any policy-review process might take account of how other nations are addressing the challenges of leadership preparation and development in similar contexts. The sections that follow derive preparatory and succession strategies for New Zealand from an overview of international policy studies, summarise the findings of three research pilots in New Zealand, and then report and discuss a national survey of educators to clarify their attitudes and intentions, to assist strategic planning.

Policies and Practices

The evolution of leadership development policies in New Zealand this century was clarified in the Ministry of Education's *Background Report* (Ministry of Education New Zealand 2007) to the OECD's Improving School Leadership project. It explained that intensifying leader-supply problems identified by a Ministerial Taskforce Report (Ministry of Education 2003) led to the allocation of additional salary increments or 'management units' for team leadership in schools. The 2004 'Teacher Census' in New Zealand confirmed that the problem was both demographic in origin and career-long in scope (Ministry of Education 2005: 5). These findings implied the need for preparatory programmes at team, executive and institutional levels of leadership, as well as ongoing succession or professional development (PD) programmes to sustain learning about leadership at institutional and system level.

The provisions since have been modest. The Ministry has mounted one pilot preparatory programme, specifically for aspirant principals; the National Aspiring Principal's Pilot (NAPP) programme. It has mounted three succession programmes, again mainly for principals; part-time competency-related induction training through the First-time Principal's Programme (FTP), online support for practising principals (Leadspace), and a week-long evaluation and professional development planning course in the Principal's Development Planning Centre (PDPC) for experienced principals.

The leadership development policy process in New Zealand has surged twice in recent years. The first, at the direction of the then Minister of Education, comprised stakeholder consultations and the collation of opinions into an indigenous policy of educational leadership; the Kiwi Leadership for Principals (KLP) (Ministry of Education 2008a). Among its other limitations (Macpherson 2009c: 56), the KLP failed to recognise the coming crises in the quality and quantity of leadership supply or draw on international policy research into leadership professionalisation strategies. Its near-exclusive focus on leadership that would improve learning and social justice through communicative rationalism bespoke the presence of the Minister's Habermasian political ideology (Macpherson 2009b).

Fortunately, at about the same time, the Ministry commissioned a systematic review of research into the leadership of student learning in schools. It was termed a 'Best Evidence Synthesis' (BES) (Robinson 2007). The BES relied heavily on 11 studies that measured the effect of educational leadership on student learning, not including effects of leadership on teacher learning, organisational learning or capacity-building in teaching teams, schools and education systems. Although it was indicated that the KLP would be the basis for New Zealand's 'Professional Leadership Strategy' (PLS) for the next three to five years in school education (Ministry of Education 2008b), the PLS has yet to be published. The Ministry evidently gave greater weight to the empirical findings of the BES when developing the PLP.

The objectives and scale of opportunities offered to primary and secondary leaders by the PLP (Ministry of Education 2009d) is summarised in Table 1, as qualified by 'Collective Agreements' (Ministry of Education 2009a), 'Professional Development' provisions (Ministry of Education 2009c) and 'Information for Experienced Principals' (Ministry of Education 2009b).

The scale of these provisions appears to be inadequate when compared to annual turnover of about 1,200 from middle and senior management positions and principalships in primary, area and secondary schools in New Zealand.

In Table 2, 'regular teachers' are defined as permanent full-time or permanent part-time teachers, not including teachers on fixed-term appointments. Teachers who have 'left' were defined as those regular teachers on the Ministry payroll in May 2007 but not in May 2008. Their rate of loss is therefore expressed as a percentage of regular teachers on the May 2007 payroll. The teachers who 'moved' were defined as those continuing on the payroll but who had moved between school types, between management levels and from permanent to fixed-term status, or vice versa, in the period. Their rate of movement is therefore expressed as a percentage of regular teachers at the outset of the period; that is, on the May 2007 payroll. Teachers who were 'recruited' in the period were defined as those regular teachers not on the payroll in May 2007 but on the payroll in May 2008. They include all returnees who left the payroll, and immigrants. Their rate of recruitment is therefore expressed in Table 2 as a percentage of regular teachers at the end of the period; that is, on the May 2008 payroll.

The situation is likely to be much worse in the ECE sector. All ECE leaders have access to 42 Māori Medium/Bilingual Teaching Study Awards, four Linking Minds scholarships and one Konica Minolta Dame Jean Herbison NZEALS Scholarship per annum (Ministry of Education 2009e); ECE directors and aspirants do not appear to have any customised preparatory or succession programmes or access to paid sabbaticals or other study leave provisions provided by the Ministry.

Further, another research report shows that the scale of throughput by New Zealand's tertiary education programmes in educational leadership are about one-third of what they should be (Macpherson 2010b). Hence, despite the international plaudits justifiably given to the BES research, leadership development policy and provisions in New Zealand continue to lag behind initiatives across the Tasman and await a new policy of comprehensive professionalisation and commensurate national investment.

The series of warnings in Australia about a coming supply and quality crisis in educational leadership were heard by the states, to a greater or lesser extent. Scott's (2003) workforce projections in New South Wales showed about 75 per cent of secondary principals and about

Table 1: The objectives and scale of opportunities offered by the Professional Leadership Plan 2009–2012

Level	Objectives	Scale of opportunities
Middle and senior leaders	Middle and senior leaders are to: a. implement National Standards in literacy and numeracy; b. improve the achievement of every student with a particular focus on Māori and Pasifika students, and those with special educational needs; c. embed teaching practices which are culturally responsive and based upon the evidence of what improves outcomes for diverse students.	The funded opportunities include: • access to 75 one-year study leave awards; • access to 40 (from 2009) or 50 (from 2010) ten-week awards of paid sabbatical leave; • access to one Konica Minolta Dame Jean Herbison NZEALS Scholarship per annum; • access to within-school professional development (PD) in literacy, numeracy and curriculum; • access to management units, allowances and release time; • access to leadership and management advisers; • access to specialist classroom teachers; • access to online tools and resources through the Educational Leaders website; and • access to professional networks.
Aspiring principals	Aspiring principals are: a. to be identified and developed for principal positions in hard-to-staff schools with a focus on developing Māori and Pasifika teachers as principals; and b. to ensure a pool of quality applicants.	The funded opportunities include: • access to 75 one-year study leave awards; • access to 40 (from 2009) or 50 (from 2010) ten-week awards of paid sabbatical leave; • access to 230 places per annum on the National Aspiring Principals Programme; • access to one Konica Minolta Dame Jean Herbison NZEALS Scholarship per annum; • access to within-school professional development (PD) in literacy, numeracy and curriculum; • paid management units, allowances and release time; • access to leadership and management advisers; • access to specialist classroom teachers; • access to online tools and resources through the Educational Leaders website; and • access to professional networks.

Table 1: Continued

Level	Objectives	Scale of opportunities
First-time principals	First-time principals are to be inducted in order to: a. manage school operations effectively and efficiently; b. lead change to create the conditions for effective teaching and learning for every student with a particular focus on Mäori and Pasifika students, and those with special education needs; and c. engage with family and *whanau* to improve student outcomes.	The funded opportunities include: ● access to 200 places in the 18-month First-time Principals Programme; ● access to 75 one-year study leave awards; ● (for primary and area school first-time principals in U1 and U2 schools) ten days' professional development release time over 18 months; ● access to one Konica Minolta Dame Jean Herbison NZEALS Scholarship per annum; ● access to regional office induction programme; ● access to leadership and management support; ● access to within-school professional development; ● access to schooling improvement; ● access to support for schools at risk; ● access to online tools and resources through the Educational Leaders website; and ● access to professional networks and management advice.
Experienced principals	Experienced principals (>5 years) are to have their knowledge and skills further developed to lead change in order to create the conditions for effective teaching and learning, with a particular focus on: a. those who are leading initiatives to raise Mäori achievement, b. achieving measurable gains for all student groups in participating schools, and c. engaging with family and *whanau* to improve student outcomes.	The funded opportunities include: ● primary principals – access to 80 (from 2009) or 100 (from 2010) ten-week awards of paid sabbatical leave; ● area school principals – access to three ten-week awards of paid sabbatical leave; ● secondary principals – access to 50 ten-week awards of paid sabbatical leave; ● access to one Konica Minolta Dame Jean Herbison NZEALS Scholarship per annum; ● access to 75 one-year study leave awards per annum; ● access to within-school PD; ● access to schooling improvement; ● access to support for schools at risk; ● access to professional learning groups; ● access to online tools and resources through the Educational Leaders website; ● access to professional networks and management advice; and ● access to 300 places in the pilot 18-month Experienced Principals Programme.

Table 2: Turnover and percentage turnover of educational leaders in schools, May 2007 to May 2008 (Ministry of Education 2008c)

	Regular teachers May 2007 n (%)	Regular teachers Left n (%)	Regular teachers Moved n (%)	Regular teachers Recruited n (%)	Regular teachers May 2008 n (%)
Primary MM[a]	4,891 (100)	382 (8)	217 (4)	156 (3)	4,882 (100)
Secondary MM[b]	5,931 (100)	502 (8)	275 (5)	205 (3)	5,909 (100)
Composite MM[c]	306 (100)	28 (9)	22 (7)	11 (4)	311 (100)
Area MM[d]	272 (100)	30 (11)	15 (6)	8 (3)	265 (100)
Primary SM[e]	460 (100)	36 (8)	31 (7)	8 (2)	463 (100)
Secondary SM[f]	1,209 (100)	80 (7)	86 (7)	33 (3)	1,248 (100)
Primary principals[g]	1,933 (100)	186 (10)	119 (6)	52 (3)	1,918 (100)
Secondary principals[h]	309 (100)	31 (10)	30 (10)	4 (1)	312 (100)
Totals	15,311 (100)	1,275 (8)	795 (5)	477 (3)	15,308 (100)

a. Primary school teachers holding a middle management designation

b. Secondary school teachers holding a middle management designation

c. Composite school teachers, less area school teachers, holding a middle management designation

d. Area school teachers holding a middle management designation

e. Primary school teachers holding a senior management designation

f. Secondary school teachers holding a senior management designation

g. Primary school teachers holding a principal designation

h. Secondary school teachers holding a principal designation

60 per cent of primary principals would leave in the ten years from 2003. *Teaching Australia* verified Scott's projections and urged each of the states to anticipate the coming shortfall in teaching and leadership numbers (Zammit, Sinclair, Cole, Singh, Costley and a'Court. 2006). Each state system was advised to search for 'the treasure within' the profession for its next generation of leaders (Dempster 2007). The strategic challenge identified was to develop a sophisticated strategy of grooming a pool of talented leaders-in-waiting, including identification, preparation, selection and engagement, appointment, induction, ongoing support and evidence-based succession policy and practice (Gronn 2007: 7).

One of the most sophisticated professionalisation responses was seen in the state of Victoria, which has a population and public school system of similar scale to New Zealand with a similarly politicised teacher workforce. While it is not necessarily being presented as a solution for New Zealand, it is an example of an effective policy process. The Office for Government School Education (OGSE) in Victoria developed a tightly co-ordinated and multilayered form of system leadership (Matthews, Moorman & Nusche 2007: 16) that shared best evidence from

international sources in *Learning to Lead Effective Schools* (OGSE 2006), and then systematically implemented a fresh leadership development strategy: *The Developmental Learning Framework for School Leaders* (OGSE 2007).

Unlike many other international examples that follow the American solution (Murphy 2005), this *Learning Framework* did not seek to implement a vision through a set of leadership standards or benchmarks. It developed progressive levels of competence or performance in five domains of educational leadership – technical, human, educational, symbolic and cultural – derived from an evidence-based model of transformational leadership (Sergiovanni 1984, 2005) consistent with a communitarian political ideology (Macpherson 2009b). Most importantly, the *Learning Framework* has since been implemented through at least 19 customised forms of fully funded preparatory and in-service professional learning opportunities for leaders. An OECD evaluation found that the implementation integrated three distinct strategies that (Matthews et al. 2007: 21):

    a. It addressed the needs of selected target audiences (current and aspirant leaders of teaching teams, school leadership teams and small schools; assistant principals; newly appointed and highly experienced principals; women leading teachers; high-potential leaders; experienced and expert teachers; and professional development coordinators).

    b. It offered role-specific content (pedagogical leadership, human resource management, strategic planning, capacity building, etc.).

    c. It provided a mix of practice-based and reflective learning modes (professional leave, contracted research and development, coaching, mentoring, seminars, and postgraduate courses and programmes, including the Master of School Leadership developed in collaboration with two leading universities).

Regarding quality, the OECD case study evaluation concluded that 'In international terms, the Victorian model of leadership development is at the cutting edge' (Matthews et al. 2007: 28) and 'provides a working model of system-wide school leadership development from which other systems can learn' (Matthews et al. 2007: 31).

Two lessons for New Zealand that can be drawn from Victoria are that:

    a. a sophisticated response to the leadership quantity and quality crises in education requires substantial public investment; and

    b. such levels of investment require an evidence-based justification and a comprehensive implementation plan of programmes.

A recent review (Macpherson 2009c) of the international research literature on the professionalisation of educational leaders concluded that Australasian education systems would be well advised to address emergent crises in the quality and quantity of supply by developing integrated educational leadership development policies and programmes with particular features: active learning, skills training and higher education connected to practice; a career-related learning framework; effective role transitions; summative and formative evaluation of leadership services; a validated indigenous knowledge base in a multicultural context; and a research and development role for universities. Four key strategies were recommended:

    a. redefine school leadership responsibilities to untangle ambiguities of governance and recentralisation, deepen the research base of leadership practice and advance deep learning about the dilemmas of practice;

b. distribute school leadership to help resolve endemic role overload and role conflict over accountabilities;

c. develop a national framework for leadership learning to reconcile careers, institutional needs, demands for system leadership, and terms and conditions of service; and

d. make school leadership an attractive profession through the professionalisation of recruitment, salaries, national associations and career development.

While New Zealand's educational leadership development policies and programmes are yet to exhibit these features, strategies and appropriate levels of investment, there is uneven progress in these directions. For example, the PLP is the most developed example of a career-related national learning framework for the systematic professionalisation of leaders in New Zealand's history; despite replacing the PDPC with the pilot 18-month Experienced Principals' Programme, largely equating leadership with principalship and the absence of early and late career leadership and ECE provisions. Nevertheless, extending the PLP framework to incorporate the suggestions derived from the international review of policy options (Macpherson 2009c: 110) resulted in the preliminary career-based learning framework for educational leaders in New Zealand, presented as Table 3.

The preparatory and succession strategies listed in the two final columns of Table 3 were used to develop a draft survey instrument. The instrument was subsequently refined by surveying samples of experienced principals, neophyte leaders and senior educators. The findings are summarised in the next section.

Three Pilot Surveys

Fourteen secondary-school principals provided their views in June 2008 concerning the draft preparatory and succession strategies (Macpherson 2009a). The five issues highlighted by their responses were the need to cater for the diversity of career paths, the need for role-specific skills training by leadership designation, the need to integrate such skills development with deeper learning about leadership, the importance of extrinsic motivators of engagement, and the need for national investment in leadership development infrastructure. It was tentatively concluded that the diversity of their career paths implied the need for inclusionary preparatory and succession strategies that:

a. minimise the use of entry conditions;

b. maximise the number of entry and exit points in training and higher-educational provisions;

c. maximise the modularisation and cross-crediting of opportunities to encourage ongoing and deep learning about leadership;

d. systematically engage leaders as providers and receivers of mentoring; and

e. integrate experiential and higher learning to blend the best of local knowledge with international research findings.

The underdeveloped provision of role-specific skills training and higher learning at different designations or levels of leadership was troubling. Most respondents were apparently promoted into team and executive leadership roles for which they had little training or deep understanding, which, potentially, set them up for failure. The heavy reliance on 'learning on the job' apparently helped create idiosyncratic leadership theories, and, when consolidated by accelerated advancement, limited their professionalism in educational leadership to amateur

Table 3: A preliminary career-based learning framework for educational leaders in New Zealand

Career stage	Characteristic roles	Focus of learning interests	Preparation strategies, pre-service	Succession strategies, in-service
Potential leaders	Beginning teachers, *kaiako*, basic scale teachers with little current interest in offering leadership or management units	Mastery of classroom management and trialling innovations	• Initial graduate teacher training, includes classroom leadership	• Pedagogical and curriculum professional development
Aspirant leaders	Fully registered teachers, *kaiako*, 'master teachers' seeking management units	Classroom and team leadership	• Work shadowing • Skills training in classroom leadership	• Coaching and mentoring • Leadspace online resources, remodelled as LEA*
Team leaders	Middle-management roles: experienced teachers, *kaiwhakahaere*, teacher leaders, syndicate leaders, heads of departments, year-level co-ordinators	Team leadership and project management	• Work shadowing • Team leader identification and recruitment programme • National aspiring team' leaders programme	• Annual induction & development conference • Coaching and mentoring • Leadspace online resources, remodelled as LEA • Postgraduate scholarships in educational leadership
Executive leaders	Senior management roles: members of senior management teams, assistant principals and deputy principals	Educational management, executive functions	• Work shadowing • Executive recruitment programme • National aspiring senior managers' programme	• Annual induction & development conference • Coaching and mentoring • Leadspace online resources, remodelled as LEA • Postgraduate scholarships in educational leadership
Institutional leaders	ECE directors, head teachers, teaching and non-teaching principals	Educational leadership and educational management	• Work shadowing • Institutional leaders' recruitment programme • National aspiring principals' programme	• First-time principals' programme • Annual development conference • Coaching and mentoring • Principals' development planning centre • Principals' professional learning groups • Leadspace online resources, remodelled as LEA • Master's and EdD scholarships in educational leadership
System leaders	ECE senior teachers, system managers, programme leaders, advisors and consultants	System management and strategic leadership, policy making and implementation	• Leaders' retention programme • National aspiring system leaders' programme	• Annual induction & development conference • Coaching and mentoring • Leadspace online resources, remodelled as LEA • EdD/PhD scholarships in educational leadership

* See the OECD case study of the Austrian Leadership Academy (Stoll, Moorman & Rahm 2007).

status. It may also be that younger and more assertive leaders are less likely to value the development of analytic and critical capacities gained through higher learning than those who have 'learned the hard way' and became more reflective about the more fundamental dilemmas of leadership. There were, for example, no references in the responses to systematic reviews of research into the effect on student achievement of teacher interventions (Hattie 2009) or leadership interventions (Robinson 2007), or of the comparative effectiveness of different forms of PD (Timperley, Wilson, Barrar & Fung 2008).

The second pilot gathered data from 28 neophyte leaders in July 2008 at the Extending High Standards Across Schools Conference (Macpherson forthcoming). They endorsed the concerns highlighted by the first pilot sample and raised five additional issues:

    a. the need for a district or regional system to deliver career planning and mentoring;

    b. the growing latent demand for access to deep learning about team, executive and institutional leadership;

    c. how negligible preparation, limited support and uneven ongoing PD of teaching principals was having serious consequences for children, remote communities and the education system;

    d. how acceleration through or bypassing designations was further reducing role-specific leadership capacity; and

    e. that learning about leadership after appointment is not being sustained due to the absence of a succession policy and strategy.

It was tentatively concluded that accelerating progression across leadership designations was increasing the chances of idiosyncratic theory, evidence-free practice and leadership failure, especially by teaching principals in small, remote primary schools. The reported workloads and learning patterns of teaching principals suggested that they were far less likely to succeed than leaders in any other leadership designation. The scale of career planning and mentoring apparently required to address the challenges involved implied the need for a delivery system conceived as generic practice in school networks, supported by district or regional experts and embedded through PD as a professional norm of engagement by recipients and providers.

Regarding the ongoing development of teaching principals, the predominant preference for self-managed and experiential methods over access to refined knowledge and skill sets specific to institutional leadership was particularly worrying. It appears that system leaders can expect to have to respond to a growing degree of leadership and learning failures in schools, small and remote schools in particular, in order to contest local erosion of public confidence in the state education system. In sum, the second pilot indicated that leadership development infrastructure was needed to enable:

    a. aspirant leaders, middle and senior managers, and teaching and non-teaching principals to acquire the skills and understandings specific to their different roles prior to service; and

    b. all leaders to sustain their learning about leadership so that their service demonstrably improves and adds to the net leadership capability of the state education system.

The third pilot conducted in October 2008 collected the views of 12 members of the Wellington branch of a national professional association about their career paths and the appropriateness of preparatory and succession strategies (Macpherson 2010a). Although the sample was unusual for their relative professional seniority, span of responsibilities and postgraduate

qualifications, the respondents endorsed the responses of two earlier pilots. For example, their career-path data exhibited a general phenomenon of accelerating 'stepping stoning' across designations, largely without role-specific training prior to appointment, to the point where role mastery 'learned the hard way' coincided with advancement to the next designation, in effect limiting their professionalism of their leadership to serial amateurism.

This third sample further articulated some policy preferences, specifically that preparatory and succession strategies should:

    a. address the changing needs of leaders at each step as they developed a career across a sequence of designations;

    b. offer prior evidence-based knowledge about leadership;

    c. offer preparatory PD in role-specific skills; and

    d. offer on-going direct support (through mentoring and networking) in order to mediate the inevitably idiosyncratic learning of leadership 'on the job'.

They proposed additional preparatory strategies: 'acting up', fixed-term contracts, cadetships, shadowing and, most urgently, a national preparatory strategy customised for leaders in ECE. Additional succession opportunities were also suggested: offering shadowing, release for short-term assignments, succession planning as a core leadership skill in leadership education, and PD in strategic planning for middle and senior managers.

National Survey

An invitation to participate in a national online survey was issued in November 2008 with a month's deadline given for responses. The invitation went to all 2,030 schools and pre-schools in New Zealand and to all 3,495 members and friends of a national professional association. As recommended by Kaplowitz, Hadlock & Levine (2004), two reminders were sent. A third reminder was sent just before the deadline to indicate that an extension was being provided due to a late surge in demand to participate because of workload pressures. Due to the inevitable overlap in the lists, the maximum potential number of respondents was estimated to be about 4,300.

A total of 495 useable responses were received, a response rate of 11.5 per cent. This is towards the lower end of typical email survey response rates internationally, which have been falling steadily since 1989 (Sheehan 2001). In their closing comments, 25 respondents indicated that the survey had added to their thinking, that they looked forward to feedback and that they were willing to assist further with the research. On the other hand, eight respondents complained about the time taken to complete the survey. These and other comments suggested that the response rate was attributable to workload pressures on respondents, the four-page length of the questionnaire and the time of year it was administered (close to the end of a school term, just before Christmas).

The relative quality of this opportunistic sample can also be judged from its structure and characteristics. The largest group of respondents were 231 (47 per cent) non-teaching principals, followed by 81 (16 per cent) teaching principals, ECE centre directors or their equivalent. The other respondents were 51 (10 per cent) in senior management posts or equivalent, 30 (6 per cent) in non-school system management roles, 29 (6 per cent) in middle-management roles or equivalent, 24 (5 per cent) in other institutional management roles, 20 (4 per cent) in basic scale or equivalent roles, 17 (4 per cent) in independent roles, 9 (1 per

cent) in other roles, and 3 (1 per cent) retired. The most significant aspect of this distribution – that just under half of all respondents were non-teaching principals and one-sixth were teaching principals, ECE centre directors or their equivalent – imposes a limit on interpretation.

The gender, age and ethnic characteristics of the sample were found to be broadly representative of all leaders, as indicated by the 2004 Teacher Census (Ministry of Education 2005: 4, 5), although the Census did not include non-school teachers in ECE, Ministry and other roles. Of all respondents, 277 (56 per cent) were women, 218 (44 per cent) were men. Regarding age, 88 (18 per cent) were 60 or over, 243 (50 per cent) were 50–59, 110 (22 per cent) were 40–49, 48 (10 per cent) were 30–39, and 6 (1 per cent) were 20–29. With regard to ethnicity, 435 (88 per cent) self identified as NZ European/Päkehä, 33 (7 per cent) as Mäori, 15 (3 per cent) as Other, 9 (2 per cent) as Paskifika, and 3 (1 per cent) as South African. Since Mäori teachers compose about 10 per cent of all teachers in New Zealand (Murray 2006: 12), Mäori were slightly under-represented.

With respect to qualifications, 291 (59 per cent) of the respondents held a teaching diploma, 161 (33 per cent) held a teaching degree, 137 (28 per cent) held a postgraduate diploma, 140 (28 per cent) held a master's degree, 91 (18 per cent) held a non-teaching first degree, 39 (8 per cent) held other qualifications, 35 (7 per cent) held a postgraduate certificate, 12 (2 per cent) held an EdD, 12 (2 per cent) held a PhD, and one held no qualifications. It appears that the respondents held broadly similar qualifications to those joining the First-Time Principals (FTP) programme in New Zealand in 2005 and 2006, although without the 'tail' of those appointed without any qualifications. To clarify, the highest qualification held by members of the 2005 FTP cohort was a bachelor's degree (35 per cent), an undergraduate diploma (17 per cent), or a master's degree (12 per cent), yet with another 36 per cent apparently appointed without any of these qualifications (Robinson, Eddy & Irving 2006: 152). The highest qualification held by members of the 2006 FTP cohort was a bachelor's degree (46 per cent), an undergraduate diploma (25 per cent), or a master's degree (9 per cent), and with 20 per cent appointed without any of these qualifications (Robinson, Irving, Eddy & Le-Fevre 2008). It appears that those who were appointed to principalships without any of these qualifications were largely absent as respondents.

When respondents were asked to indicate all of the leadership development services they had gained access to, 298 (60 per cent) referred to Leadspace, the online resource service provided by the Ministry of Education. There were 91 (18 per cent) references to the PDPC, 85 (17 per cent) to the FTP, 41 (8 per cent) to the Principals' Professional Learning Groups (PPLG), 15 (3 per cent) to the NAPP, 179 (36 per cent) to Other services, and 87 (17 per cent) who had not gained access to development services. These data suggest that Leadspace has become a leading leadership development delivery system in New Zealand, perhaps by default given the reportedly modest availability of alternatives to teaching principals in more remote primary schools and to ECE leaders.

To clarify their intersectoral mobility, respondents were asked to indicate which service sector they has spent most of their professional time in, and then to indicate all sectors they had spent professional time in. Table 4 summarises and compares responses against the lowest degree of mobility found in all sectors, specifically in the primary school sector.

Table 4 indicates that about one in six of the respondents that had spent most of their professional time in primary schools had also served in other sectors. The ECE and secondary-

Table 4: The relative inter-sectoral mobility of respondents

	Sector most professional time spent in	All sectors professional time spent in	Percentage of respondents that have served in more than one sector	Intersectoral mobility indexed against primary education
Primary education	288	339	15%	1.0
Early childhood education	52	78	33%	2.2
Secondary education	107	174	38%	2.5
Tertiary education	35	99	64%	4.3
Other	8	49	84%	5.6
Ministry (regional or central)	5	43	88%	5.8
Totals	495	782	37%	2.9

education respondents had over twice the level of intersectoral mobility of primary-school education respondents. On the same basis, equivalent tertiary education respondents were over four times as mobile and Ministry respondents were nearly six times more mobile.

National Survey Findings

Respondents were asked to indicate the extent to which they agreed that they got 'a great deal of satisfaction from [their] role'. Responses were strongly skewed; 225 (46 per cent) strongly agreed and 215 (43 per cent) agreed with the proposition. Only 32 (6 per cent) were neutral, with 10 (2 per cent) disagreeing and 10 (2 per cent) strongly disagreeing (3 did not respond).

When asked to clarify the main sources of their satisfaction, their comments were classified using content analysis and are presented in Table 5.

It appears from Table 5 that the respondents could be gaining over 80 per cent of their satisfaction in their current roles by taking up the challenges of leadership, facilitating student achievement, mobilising staff support and development, and developing supportive relationships and partnerships in the community. It might also be anticipated from Table 5 that the main sources of dissatisfaction would be perceived impediments to gaining such satisfaction.

Respondents were therefore asked to indicate the main sources of dissatisfaction in their current roles. The references to sources were similarly classified using content analysis and are presented in Table 6.

It appears that the respondents regard the nature of system management, specified as the bureaucratisation, centralisation, fragmentation and politicisation of the Ministry of Education, as providing over 60 per cent of the impediments to their leadership intended to facilitate student achievement, mobilising staff and developing supportive relationships and

Table 5: Main sources of satisfaction in current roles

References to sources of satisfaction, classified	Number of references	Total (%) of all references	General sources of satisfaction indicated
Engagement in school strategic leadership	79	257 (31%)	Enjoying the challenges of leadership
Being empowered and enabled to lead well and help others	69		
Role diversity and complexity of challenges	34		
Effective school management systems	32		
Making a difference to children's achievement through inclusionary change management	27		
Collegial relationships and collaborative processes	16		
Leading change that makes a difference to students' achievement, growth and progress	112	203 (24%)	Effective facilitation of student achievement
Interacting with students, addressing their learning needs and interests, building their confidence and competence as learners, caring, celebrating success	74		
Improving learning by teachers and students through exemplary and collaborative teaching and mentoring	17		
Facilitating PD through teamwork, coaching, mentoring	143	178 (21%)	Supporting and developing colleagues
The professional development of colleagues	35		
Developing supportive relationships between students, parents, teachers, RTLBs, BOTs, other schools and principals, etc. that help raise student achievement and further develop the school or centre	48	102 (12%)	Supportive community relationships and collaborative partnerships
Engaging and empowering collaborative partnerships in diverse learning communities to help improve learning and family life	38		
Developing teams and networks that explore safe, caring and inclusive learning opportunities for children and problem-solving in families and society, especially in low decile areas	16		
Leading improvements to the quality of teaching and learning	34	64 (8%)	Pedagogical and curriculum leadership
Leading curriculum development, including programme planning, materials, implementation and evaluation	23		
Leading improvements to student assessment	7		
Contributions to other colleagues and schools	37	37 (4%)	System leadership
Total		841 (100)	

Table 6: Main sources of dissatisfaction in current roles

References to sources of dissatisfaction, classified	Number of references	Total (%) of all references	General sources of dissatisfaction indicated
The bureaucratisation of MOE administrative processes, which is undermining capacity for educational leadership in schools	274	501 (62%)	System management
The centralisation of MOE policy directives, investments and compliance requirements, which are intensifying, increasingly politicised and standardising the management of school finance, property and payroll	113		
The fragmentation of policy-making in the MOE, which has produced unmanageable expectations, imposed continuous curriculum change, and impeded local governance, school self-management, innovation and PD	83		
The politicisation of system leadership in the MOE and ERO, which is compromising the quality of teaching, research, PD, school improvement interventions, collaboration with professional associations, recognition of educators, succession planning and support for small schools.	31		
Inadequate funding and support services for schools, which are needed to deliver equity policies, cater for special needs, and sustain 'new' initiatives, research, ICT applications, teaching aides and secretarial support	138	225 (28%)	Quality of school resources
Uneven teacher productivity due to ineffective performance management systems, industrial rigidities, soft accountabilities, growing diversity, turnover in low decile and remote schools, shortage of exciting/well-trained staff, dysfunctional attitudes, unclear career pathways, inadequate compensation, and low investment in qualifications	87		
Unreasonable expectations from parents that are based on negativity, anxiety and ill-informed critique and sometimes reflect cruel, aggressive and dysfunctional parenting	33	84 (10%)	Quality of stakeholder participation
Inappropriate student behaviour, which disrupts learning	27		
Inappropriate governance activity, which impedes management and teaching	24		
Total		810 (100%)	

partnerships. The other two comparatively significant factors indicated by Table 6 are perceived inadequacies of funding and support services, and teacher productivity.

The final three general sources of dissatisfaction (parental expectations, student behaviour and school governance) are apparently not unimportant but comparatively minor impediments to leadership intended to raise student achievement. In sum, it appears highly probable that potential leaders are likely to come to the view that the quality of system management and perceived inadequacies of funding and support services and teacher productivity are the major impediment to effective educational leadership in schools.

The career paths of the respondents had commonalities that indicate relatively standard career patterns. They are summarised in Table 7.

Table 7: Years service in roles (or equivalent)

	Nil	Less than 4 years	4–9 years	10–15 years	16+ years
Basic scale teacher	15 (3.0%)	78 (15.8%)	219 (44.2%)	107 (21.6%)	76 (15.4%)
Middle management	122 (24.6%)	129 (26.1%)	161 (32.5%)	61 (12.3%)	22 (4.4%)
Senior management	122 (24.6%)	97 (19.6%)	144 (29.1%)	80 (16.2%)	52 (10.5%)
Teaching principal/ ECE head teacher	245 (49.5%)	83 (16.8%)	110 (22.2%)	35 (7.1%)	22 (4.4%)
Leading an institution/ non-teaching principal/ ECE director/manager	184 (37.2%)	70 (14.1%)	89 (18.0%)	77 (15.6%)	75 (15.2%)
Non-school system roles	311 (62.8%)	87 (17.6%)	54 (10.9%)	19 (3.8%)	24 (4.8%)
Consultant	413 (83.4)%	48 (9.7%)	20 (4.0%)	12 (2.4%)	2 (0.4%)
Years to retirement	0 (0%)	101 (20.4%)	150 (30.3%)	131 (26.5%)	113 (22.8%)

A number of career tracks are suggested by Table 7. Very few of the respondents had proceeded to leadership roles without preliminary experience as a basic-scale teacher. Nearly half had served as teacher for four to nine years prior to advancement, with another fifth advancing after ten to fifteen years service as a teacher. This suggests that many of the respondents were initially reluctant to offer leadership service.

A quarter of the respondents had never served in middle-management roles, another quarter had served less than 4 years, a third served in middle-management roles for four to nine years, and the remaining sixth had stayed in such roles for more than nine years. Similarly, a quarter of the respondents had never served in senior management roles, a fifth had for less than four years, nearly a third for four to nine years, and the remaining quarter for more than ten years. The commonalities at middle- and senior-management service levels are that a quarter of the respondents have never served at these levels, and, of those that have, nearly 60 per cent did

so for less than nine years, suggesting that they used the appointments as 'stepping stones' to other leadership roles. It also appears more likely that senior managers would regard their appointment as the terminal point of their career as compared to middle managers; one-quarter as compared to one-sixth.

It also appears unlikely that those respondents with up to nine years' experience as teaching principals would regard their appointment as their terminal appointment. Comparatively few had served longer than this. In sharp contrast, there were comparatively more with more than nine years' experience in non-teaching leadership roles, implying that these positions were far more often regarded as the capstone of leadership careers.

In sum, it appears that non-teaching leadership roles are more likely to be regarded as terminal career appointments and that the career norm is to spend four to nine years or less in prior 'steeping stone' positions. The pattern of foreshadowed retirements indicates that one-fifth of the respondents will retire in the next four years, and this number will peak in the coming four-to-nine-year period and then have a long tail of sustained retirements in the next 9–16-year period.

The main factors behind 482 (97.4 per cent) respondents' decisions to retire are summarised in Table 8.

Given this degree of professional frustration, it is interesting that 359 (72.5 per cent) respondents indicated that they planned to refocus their engagement in education *instead* of retiring. A construct analysis of their alternatives to retirement is summarised in Table 9.

Actual Preparation for Leadership

Potential leaders (defined as undecided about becoming a leader) were asked what would encourage them to become an aspirant leader. A construct analysis of the reasons given by 101 (21 per cent) respondents, self-classified as potential leaders, is provided in Table 10.

The main implication of Table 10 appears to be the need for a comprehensive leadership development strategy intended to convert potential leaders into aspirants with both systemic programmes and incentives, along with school-based initiatives, perhaps delivered regionally through networks.

When asked what discouraged them as potential leaders from becoming aspirant leaders, 102 (22 per cent) respondents provided the reasons shown in Table 11, which appears to reiterate the main sources of dissatisfaction indicated by Table 5.

All aspirant and current leaders surveyed were then asked to identify the factors that had encouraged them into leadership service. The factors identified by 347 (73 per cent) respondents are summarised in Table 12, which appears to reiterate and clarify the sources of satisfaction indicated in Table 4.

When respondents were asked to asked about the barriers/difficulties they encountered on entering leadership service, 268 (54 per cent) responded as shown in Table 13. This table indicates the perceived relative importance of preparatory programmes, the persistence of institutional and systemic values regarded as non-legitimate, and the challenges of reconciling the legitimate expectations and values of diverse stakeholders.

The methods used by respondents to prepare for service in leadership service at different levels are summarised in Table 14. The results are broadly consistent across levels. Learning 'on the job' from experience was the method used by about half of the respondents at each level of leadership. One of the few variations was that those preparing for non-teaching

Table 8: Main factors that will inform decisions about when to retire

References to main factors, classified	Number of references	Total (%) of all references	General factor indicated
Loss of passion, motivation and job satisfaction	171	472 (50%)	Frustrated professionalism
Job stress/burn-out, exhaustion/low energy	95		
Alienated by the workload, staffing, funding, MOE compliances	70		
Unable to make a difference professionally	64		
No longer able or wanting to lead change or accept challenges	61		
Negativity of BOT, parents, students, community, media	11		
Financial security	167	395 (42%)	Post-professionalism
Health	132		
Age	39		
Family commitments	32		
Lifestyle goals	25		
New job/exit/succession planned, projects completed, moving on	69	69 (7%)	Extended professionalism
Total	936	936 (100%)	

Table 9: Alternative plans to retirement

References to plans, classified	Number of references	Total (%) of all references	General factor indicated
Unsure but seeking interesting, less-pressured educational engagement	110	165 (36%)	Extended professionalism
Learning: reading/further study/ sabbatical/training	55		
System consultancies: in PD and OD/project management/statutory management/ governance roles, for the MOE, ERO, overseas and private	102	131 (28%)	System leadership
Research: completing and reporting significant projects	16		
Writing: policy, curriculum, e-learning, books, workshops	13		
School support roles: advising/mentoring/ coaching/appraising/advocacy/ troubleshooting/change facilitation/testing/ exam invigilator/marking	75	122 (26%)	School professionalism
Teaching: relief, special needs, literacy, tutoring, lecturing	47		
Voluntary: religious, community, sports, not-for-profit, industrial and professional association service	29	44 (10%)	Human service professionalism
Non-education work/service	15		
Total	462	462 (100%)	

Table 10: Reasons that would encourage potential leaders to become aspirant leaders

References to reasons, classified	Number of references	Number (%) of all references*	General factor indicated
Leadership potential identified and affirmed by system and colleagues	25	66 (61%)	System leadership development programmes
Mentoring/coaching/shadowing respected role models	15		
Given ability and confidence to do the job by suitable preparatory PD programme	14		
Guaranteed access to a succession programme: PD, qualifications, administrative support	12		
Able to blend educational leadership of colleagues with a teaching role	11	30 (28%)	School leadership development programmes
Being able to make a difference to gifted and struggling students and our school community	11		
Being delegated responsibility and shared leadership opportunities	8		
Better financial incentives	8	13 (12%)	System employment conditions
Proximity and availability of suitable position	4		
Flexibility of role to enable a work–life balance	1		
Total	109	109 (101%)	

* Percentages may not add up to 100, due to rounding.

Table 11: Reasons that discouraged potential leaders from becoming aspirant leaders

References to reasons, classified	Number of references	Number (%) of all references	General factor indicated
Unreasonable workload and paperwork, Ministry pressure, irresolvable stress and poor life balance	33	51 (47%)	System conditions
Inadequate administrative and Ministry/ ERO support and resources, especially re: property, payroll, finances, troubled students, PD	16		
Remuneration inadequate for the responsibility	2		
Requires compromising of principles and accepting inappropriate conditions or relationships, such as social isolation from colleagues	15	32 (29%)	School conditions
Poor current leadership modelling: political management, bullying, immature	10		
Unreasonable and unsupportive BOTS and parents	7		
Lack of role clarity, preparation and personal support, limited confidence and career opportunities	15	26 (24%)	Employment conditions
Inappropriate selection criteria and appointment processes	11		
Total	109	109 (100%)	

Table 12: Factors identified by aspirant and current leaders that had encouraged them into leadership service.

References to reasons, classified	Number of references	Number (%) of all references	General factor indicated
The attractive challenge and joy of educational leadership	127	334 (61%)	Preparation for educational leadership
Able to make a difference for students and communities	116		
Appropriate preparation for role	91		
Identified as potential leaders and encouraged to lead by colleagues, mentors, BOTs and others	169	190 (35%)	Identified as an educational leader
Style informed by critique of leadership experienced in the past	21		
Remuneration	25	25 (4%)	Incentives for accepting responsibility
Total	549	549 (100%)	

Table 13: Barriers or difficulties encountered on entering into leadership service

References to barriers/difficulties, classified	Number of references	Number (%) of all references	General factor indicated
Inadequate preparation, study, role induction, mentoring and support	152	175 (48%)	Preparation/ support
Low confidence	23		
Sexism: collegial, institutional and community	50	104 (28%)	Confronting non-legitimate values
Unprofessional colleagues and unions	36		
Ageism: considered 'too young' or 'too old'	14		
Racism: Being a Mäori, an immigrant or professionally invisible due to ethnicity	4		
Reconciling local BOT, parental and community expectations with professional values, qualifications and career interests	41	86 (23%)	Reconciling legitimate values
Reconciling family and leadership commitments	24		
Reconciling administrative and leadership duties with teaching	13		
Managing stress, workload pressure, bureaucratic compliances	8		
Remuneration inadequate	1	1 (<1%)	Remuneration
Total	366	366 (100%)	

principalships (or equivalent) turned to tertiary studies and reading. A similar yet less definite variation is that those preparing for senior management also turned to tertiary studies and reading. It may be speculated that evidence of tertiary studies and reading are believed to advantage applicants for such roles.

Another minor variation is the extent to which those preparing for teaching principalships or equivalent turned to peer-based networking rather than tertiary studies or PD. Since teaching principals lead small primary schools in more remote locations, these patterns may reflect accessibility factors. Overall, given the heavy reliance on learning 'on the job' from experience as a means of preparing for all levels of leadership, it can be concluded that this method is valued above all others and has attained the status of a professional norm in education.

Views of Preparatory Strategies

Respondents were asked to evaluate 11 preparatory strategies on a five-point scale and invited to comment on their evaluation. Table 15 provides a summary of the evaluations, ordered by the percentage of support (i.e. strongly agree plus agree).

There appears to strong support from respondents to all but two of these preparatory strategies, once the 'Not applicables' are set aside from responses to the proposal that there be a national aspiring leaders in ECE programme. The strength of the support suggests that these nine preparatory strategies be considered as valued parts of a wider leadership development policy and programmes.

The greatest ambivalence is to the proposal that there be an overseas leader recruitment programme to encourage applications from appropriate personnel. The comments from 156 (34 per cent) respondents were analysed for content (some respondents gave no comment, while others gave more than one). Those opposed to the proposition stressed the need for New Zealand trained teachers and home-grown leaders (68), that leadership should reflect New Zealand's educational culture (41), that leaders had to have a prior understanding of New Zealand's unique system, self-managing schools and curriculum (26), that there is no shortage of local applicants and potential leaders (21), and that overseas appointees would dilute New Zealand's position as a world leader in education (8). The 72 respondents that supported the proposition (some gave more than one comment) stressed the need to address shortages and expertise deficits in global employment market (28), challenge the insularity of New Zealand educators and its xenophobic systems (19), and balance the departure of many recruited for leadership roles overseas (3). These attitudes appear to reflect personal career interests in a competitive context. On the other hand, given the extent to which New Zealand education is dependent on overseas recruitment, including expatriate New Zealanders, these attitudes suggest the need for a national information campaign.

Some ambivalence was evident concerning the proposition that appropriate leadership preparation at each level should be mandatory. The comments made by 132 (29 per cent) respondents (some gave more than one comment) focussed on four issues:

   a. The most common response (51) was against depersonalised role standardisation, arguing instead for subtle criteria by organisational type and for multiple learning pathways that advance capacity building.

   b. The second most common response (38) was to express guarded support, in order to lift expertise, but also to point out potential complications that would follow unacceptable proposals, such as enabling privatisation in public education.

Table 14: References to methods of preparation by level of leadership*

References to methods of preparation	Level of leadership					
	Middle management or equivalent	Senior management or equivalent	Teaching principal/ECE head teacher or equivalent	Non-teaching principal/ECE service manager or equivalent	System management or equivalent	Consultant
Learning 'on the job' from experience	217 (50%)	216 (44%)	161 (50%)	157 (40%)	62 (50%)	51 (54%)
Tertiary studies, reading	88 (20%)	115 (24%)	54 (17%)	102 (26%)	24 (20%)	15 (16%)
PD: in-service (e.g NAAIP, PDPC), courses, action research, conferences	84 (19%)	105 (21%)	50 (15%)	71 (18%)	24 (20%)	18 (19%)
Mentored/coached/observation/role modelling (including FTP, PPLG)	50 (11%)	58 (12%)	59 (18%)	63 (16%)	12 (10%)	11 (12%)
Total	439 (100%)	494 (101%)	324 (100%)	393 (100%)	122 (100)	95 (101%)
Respondents (% of all respondents)	317 (67%)	320 (68%)	251 (53%)	273 (58%)	141 (30%)	133 (28%)

* Percentages may not add up to 100, due to rounding.

Table 15: Respondents' views of preparatory strategies

Preparatory strategy	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Not applicable
A board of trustees should be prepared with quality training and provided an experienced advisor to help them select their principal	267 (59%)	132 (29 %)	39 (9%)	11 (2%)	1 (0%)	5 (1%)
A national aspiring principals' programme should be available as a preparatory opportunity	188 (41%)	205 (45%)	40 (9%)	3 (1%)	7 (2%)	12 (3%)
Work-shadowing opportunities should be available prior to applying for leadership positions	143 (31%)	241 (53%)	56 (12%)	8 (2%)	4 (1%)	3 (1%)
A national aspiring senior managers' programme should be available as a preparatory opportunity	130 (29%)	231 (51%)	70 (15%)	7 (2%)	5 (1%)	12 (3%)
There should be a leader recruitment programme to encourage aspirant leaders to prepare for middle-management service	133 (29%)	228 (50%)	73 (16%)	12 (3%)	7 (2%)	2 (0%)
Leadership-skills training should be available prior to service at each level to ensure basic competency	161 (35%)	202 (44%)	72 (16%)	13 (3%)	5 (1%)	2 (0%)
There should be a leader-identification programme to encourage potential leaders to become aspirant leaders	155 (34%)	183 (40%)	86 (19%)	19 (4%)	9 (2%)	3 (1%)
A national aspiring middle-managers' programme should be available as a preparatory opportunity	116 (26%)	224 (49%)	85 (19%)	12 (3%)	5 (1%)	13 (3%)
Initial teacher training should include classroom leadership/ECE centre leadership	150 (33%)	173 (38%)	65 (14%)	49 (11%)	16 (4%)	2 (0%)
A national aspiring leaders in ECE programme should be available as a preparatory opportunity	108 (24%)	160 (35%)	92 (20%)	4 (1%)	4 (1%)	87 (19%)
Appropriate leadership preparation at each level should be mandatory	99 (22%)	157 (34%)	120 (26%)	61 (13%)	17 (4%)	1 (0%)
There should be an overseas leader recruitment programme to encourage applications from appropriate personnel	20 (4%)	52 (11%)	188 (41%)	108 (24%)	77 (17%)	10 (2%)

c. The third most common response (24) was to call for investment in leadership development that builds on diverse teaching experiences to improve the quality and integrity of leadership.

d. The fourth most common response (23) was to reject the regulation of professionalism, preferring many more available choices and voluntary compliance.

Ambivalence to making 'appropriate leadership preparation at each level … mandatory' is also likely to reflect how strongly respondents value idiosyncratic learning 'on the job'. When asked for any other useful preparatory strategies, respondents suggested 'acting up', a tool kit for boards of trustees (BOTs), clustering leaders, distributed leadership, system leadership, internship, secondments, online reading programme for aspiring leaders and BOTs, sabbaticals and succession planning.

Views of Succession Strategies

Respondents were then asked to evaluate 13 succession strategies on a five-point scale and invited to comment on their evaluation. Table 16 provides a summary of the evaluations, ordered by percentage support (i.e. strongly agree plus agree).

There was strong support from respondents to a mentoring and coaching of leaders programme provided by experienced leaders for the first year of service at each level of leadership, postgraduate scholarships for middle and senior managers, master's and doctoral scholarships for institution and system leaders, a leaders' retention programme, a principals' succession planning programme for Chairs of BOTs, and an annual role induction and PD opportunity for each level of leadership service. When the large numbers of 'Non-applicables' are set aside with regard to the FTP and the PPLG Programmes, due to their current non-availability to non-school sectors, they too can be seen to enjoy strong support. Overall, the strength of the support suggests that these succession strategies will be valued parts of a more comprehensive leadership development policy and programmes.

The ambivalence with regard to Leadspace was investigated by analysing comments made by 110 (25 per cent) respondents. Negative comments referred to not having time to use it (49), its limited utility (25), not knowing what Leadspace is (17), its 'illogical structure' and 'clunkyness' (12), a password policy that discourages access, use and shared leadership in schools (8), and limited services to ECE (2). Positive comments referred to the diverse materials, helpful support and opportunities for dialogue (25) and how well the site is organised and facilitated with up-to-date information, its ease of navigation and useful links (5). It appears that Leadspace is a work-in-progress that is enjoying mixed reviews.

The marked ambivalence concerning whether the Kiwi Leadership for Principals (KLP) model should be the basis for New Zealand's professional leadership strategy was similarly investigated by considering the comments made by 100 (22 per cent) respondents. About one-third of the respondents (35) declared that they were not familiar with the model, indicating its development solely in the schools sector. Supportive comments focused either the robustness of the leadership model (it was assumed to reflect the BESs and the PD offered by the FTP, PDPC and NAAP) (14) or on the 'Kiwiness' of the model (3). Negative comments focussed on three issues:

a. First, 27 respondents indicated that they were not sure how the model relates to the complexities of practice, especially the self-managing nature of leadership, instructional leadership, limited resources and community engagement.

Table 16: Respondents' views of succession strategies

Succession strategy	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Not applicable
The mentoring and coaching of leaders should be provided by experienced leaders	243 (54%)	176 (39%)	21 (5%)	4 (1%)	2 (0%)	2 (0%)
There should be postgraduate scholarships available to sustain middle and senior managers' learning about leadership	152 (34%)	215 (48%)	62 (14%)	13 (3%)	5 (1%)	1 (0%)
There should be a leaders' retention programme to enable leaders to refocus their engagement in education instead of retirement	152 (34%)	195 (44%)	76 (17%)	16 (4%)	3 (1%)	6 (1%)
Chairs of boards of trustees should be provided with quality training in principals' succession planning	147 (33%)	194 (43%)	70 (16%)	11 (2%)	8 (2%)	18 (4%)
Mentoring and coaching services should be available for the first year of service at each level of leadership	231 (52%)	191 (43%)	20 (4%)	2 (0%)	3 (1%)	1 (0%)
There should be master's and doctoral scholarships available to sustain institution and system leaders' learning about leadership	147 (33%)	186 (42%)	84 (19%)	18 (4%)	8 (2%)	5 (1%)
There should be an annual role induction and PD opportunity for each level of leadership service	93 (21%)	225 (50%)	102 (23%)	18 (4%)	8 (2%)	2 (0%)
The First-time Principals' Programme is valuable	136 (30%)	119 (27%)	77 (17%)	3 (1%)	0 (0%)	113 (25%)
The Principals' Professional Learning Groups are valuable	109 (24%)	146 (33%)	90 (20%)	2 (0%)	0 (0%)	101 (22%)
Leadspace is a valuable online resource for educational leaders	71 (16%)	163 (36%)	143 (32%)	24 (5%)	13 (3%)	34 (8%)
The Kiwi Leadership for Principals model should be the basis for New Zealand's Professional Leadership Strategy	52 (12%)	141 (31%)	167 (37%)	18 (4%)	10 (2%)	60 (13%)
The Principals' Development Planning Centre Programme is valuable	83 (18%)	92 (20%)	140 (31%)	5 (1%)	7 (2%)	121 (27%)
Teaching in New Zealand should become an all-master's profession	28 (6%)	54 (12%)	111 (25%)	150 (34%)	99 (22%)	6 (1%)

    b. Another 21 were not comfortable with a standardised, 'politically correct' and nationalistic model being used as the sole basis for a professional leadership strategy.

    c. Seven saw the model as conceptually simplistic in that its links to the BESs were not clear, it equated leadership with principalship, it ignored ECE, it failed to integrate PD with higher learning and research and development, and it ignored international research.

These findings indicate that the KLP is too controversial to be used as the basis for a professional leadership development policy process, and, when compared to the rigour of the BES, should be consigned to political history. Similarly, the substantial ambivalence of respondents regarding the PDPC, and the limited coherence between the PDPC and the KLP and the BES findings that led to its closure (McGregor 2008: paras 25, 26), suggests that its consignment to educational history was probably warranted.

Over half of the respondents disagreed with the proposition that teaching in New Zealand should become an all-master's profession. Another quarter were neutral. The comments made by 164 (37 per cent) respondents were analysed to clarify dispositions. The reasons given for disagreeing were that:

    a. qualifications do not guarantee or indicate teaching competence and effective relationships (79);

    b. qualifications do not guarantee or indicate leadership competence (27);

    c. the present requirements are appropriate and practical (18);

    d. some people prefer other approaches to development (12);

    e. many highly qualified people lack relationship-building and people skills and experience (8);

    f. the teacher and leader shortages will worsen (6); and

    g. there is no evidence to justify this approach (6).

The two reasons given for agreeing were that:

    a. more experienced teachers and leaders should be encouraged to get an appropriate master's degree to further develop their professionalism with a scholarship and a salary incentive (39); and

    b. an all-master's profession is an appropriate long-term aspiration to ensure ongoing learning, is the norm in Finland and the new policy in England, and is important to bring New Zealand into line with other developed countries (21).

Nine respondents indicated that they did not understand the proposition. Overall, it can be concluded that an 'all-master's teaching profession' policy would be controversial in New Zealand. Given the responses summarised in Table 13, it appears that a norm of targeted higher education intended to underpin evidence-based leadership could be achieved over time without undue controversy by funding postgraduate scholarships for middle and senior managers and master's and doctoral scholarships for institutional and system leaders. As explored in another research report (Macpherson 2010b), the current policy of investing in the slow creation of an 'all-graduate profession' appears to be retarding the emergence of 'all-master's leadership professionalisation'.

Expectations of a National Professional Association of Educational Leaders

Respondents were then asked to evaluate 13 proposed services that might be expected of a national professional association of educational leaders on a five-point scale and invited to comment on each evaluation. Table 17 orders the evaluations by percentage support (i.e. strongly agree plus agree).

It appears that these respondents share the view that all but the last two services should be expected of professional associations for educational leaders. Given the degree of support for the first 16 proposals, a professional association for educational leaders that fails to deliver on these expectations might expect their market share to shrink. The process may be advancing; one respondent spoke for many when he or she claimed, with regard to a specific national professional association for educational leaders, that it 'is dying top down'.

Despite their strong support for encouraging research into educational leadership issues, respondents exhibited some ambivalence regarding the idea that professional associations should make awards to celebrate high-quality research and innovative practice. The 31 (7 per cent) comments made regarding responses to this proposal were analysed. Of the supportive comments made, 15 argued that such recognition is rare across all the education sectors, with 3 others noting the particular value of community recognition, the work of groups and diversity. The 13 negative comments stressed that such recognition can be elitist and subjective, and manipulated to reward compliance.

There was substantial ambivalence regarding the proposal that a professional association should represent educational leaders in discussions with employers regarding their terms and conditions of service. The 55 (13 per cent) comments were sharply polarised. They either advised against the proposal, because it would confuse the role of a professional association with the role of a union (42), or supported the proposal on the grounds that leaders need their own representation and to set directions and develop support (13).

When asked if there other useful services that might be expected of a professional association for educational leaders, 30 (7 per cent) respondents commented on the need to:

    a. strengthen current associations and ensure representation of all groups in leadership (10);

    b. create networks between leaders within and outside of education, in New Zealand and overseas (7);

    c. develop a national leadership development strategy that integrates one peak body of educational leaders in national and district professionalisation processes, especially for minority and remote leaders (6);

    d. provide legal assistance representing leaders in disputes (3);

    e. strengthen links with business (3); and

    f. offer professional supervision.

Overall, it can be concluded that professional associations seeking to recruit and retain educational leaders as members should consider delivering all but the last two services listed in Table 17. Further, they would be well advised to consult prior to celebrating high-quality research and innovative practice, remain wary of becoming involved in industrial representation and yet stay alert to the diverse and changing needs of members and potential members. Conversely, unions are advised that substantial minorities appear to be sensing three needs that may require fresh enabling structures: more effective representation, more

Table 17: Services expected of a national professional association of educational leaders

Services expected of a professional association	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Not applicable
It should encourage research into educational leadership issues	179 (41%)	210 (48%)	28 (6%)	7 (2%)	5 (1%)	5 (1%)
It should provide regular networking events locally for members	136 (31%)	244 (56%)	43 (10%)	4 (1%)	2 (0%)	5 (1%)
It should collaborate with other providers of PD to educational leaders	142 (33%)	231 (53%)	47 (11%)	6 (1%)	1 (0%)	7 (2%)
It should collaborate with other stakeholders to advance national policy-making in education	162 (37%)	210 (48%)	45 (10%)	9 (2%)	3 (1%)	5 (1%)
It should advocate the professionalisation of educational leadership	159 (37%)	208 (48%)	52 (12%)	6 (1%)	2 (0%)	7 (2%)
It should link members and others in the field of educational leadership	129 (30%)	236 (54%)	57 (13%)	4 (1%)	2 (0%)	6 (1%)
It should provide a regular newsletter about current events and issues in educational leadership	117 (27%)	248 (57%)	56 (13%)	5 (1%)	3 (1%)	5 (1%)
It should lobby government to advance the interests of educational leaders	173 (40%)	182 (42%)	58 (13%)	9 (2%)	8 (2%)	4 (1%)
It should provide PD to aspirant and current educational leaders	144 (33%)	212 (49%)	57 (13%)	13 (3%)	3 (1%)	5 (1%)
It should coordinate invited speakers and study visits	131 (30%)	223 (51%)	68 (16%)	3 (1%)	2 (0%)	7 (2%)
It should enable networking with other national and international professional associations of educational leaders to the benefit of members	120 (28%)	230 (53%)	68 (16%)	6 (1%)	4 (1%)	6 (1%)
It should provide a scholarly journal reporting research in educational leadership	122 (28%)	220 (51%)	71 (16%)	11 (2%)	4 (1%)	6 (1%)
It should participate actively in education policy reviews as a national stakeholder	132 (30%)	208 (48%)	68 (16%)	16 (4%)	5 (1%)	5 (1%)

Table 17: Continued

Services expected of a professional association	Strongly agree	Agree	Neutral	Disagree	Strongly disagree	Not applicable
It should coordinate mentoring and coaching services for educational leaders	140 (32%)	196 (45%)	79 (18%)	13 (3%)	1 (0%)	5 (1%)
It should provide information and public commentary on national educational issues	108 (25%)	228 (52%)	72 (17%)	16 (4%)	5 (1%)	5 (1%)
It should provide an annual conference for members, colleagues and international associates	104 (24%)	213 (49%)	91 (21%)	16 (4%)	6 (1%)	4 (1%)
It should make awards to celebrate high-quality research and innovative practice	108 (25%)	167 (38%)	114 (26%)	20 (5%)	20 (5%)	5 (1%)
It should represent educational leaders in discussions with employers regarding their terms and conditions of service	89 (20%)	119 (27%)	126 (29%)	56 (13%)	38 (9%)	6 (1%)

sophisticated networking, and a leadership development strategy that more comprehensively addresses the diverse nature of educational leadership.

When thanked for their contributions, and asked if they had any final comments, 80 (18 per cent) respondents took the opportunity to comment. The first two issues raised were to do with the survey itself and have been noted above. The other five issues raised related to the issues surveyed. Most common was advocacy from 31 respondents for aspects of a fresh and comprehensive leadership development strategy for potential and current leaders for educational ends, in a changed political environment. Others (18) reiterated their concerns about leaders' workloads, elitism and racism, bureaucracy and accountability, professional distance between teachers and leaders, and how leaders have to choose which local, regional and national organisations they affiliate with for reasons of time, finance, applicability and so on. Some (11) discussed the quality of current leadership development services with a few (8) recommending the services currently provided by particular sector-specific professional associations.

Discussion

The interpretation of findings is limited by the modest response rate, the disproportionately high response rate by non-teaching principals, the relatively low response rate by ECE educators and the absence of principals appointed without qualifications. On the other hand, the respondents' characteristics regarding gender, age, ethnicity and qualifications were found to be broadly representative of all educators. The survey items were systematically informed by reference to international research and practices and then refined using three pilots. The findings were progressively reported to respondents where possible using only distributional data to maximise understandings. Given these limitations, the findings are considered worthy of provisional trust and consideration.

The findings are now discussed, following the structure of the survey instrument. The first issue concerns general dispositions to the work world of those surveyed. Respondents took over 80 per cent of their work satisfaction from attending to the challenges of leadership, enabling student achievement, facilitating staff support and development, and creating supportive relationships and partnerships in the community. Conversely, they attribute over 60 per cent of the impediments to achieving their intentions as leaders to the bureaucratisation, centralisation, fragmentation and politicisation of the Ministry of Education, and nearly 30 per cent to inadequacies of funding, support services and teacher productivity. Establishing the accuracy of these perceptions would involve a systematic review of the administration of education, clearly outside the scope of this study. In the interim, this intense degree of professional frustration of leaders in New Zealand education draws attention to the first two and the fourth strategies recommended above from international practices; the importance of redefining and redistributing school leadership responsibilities, and, making school leadership an attractive profession.

The second issue concerns the diversity of career paths, the acceleration of 'stepping stoning' behaviours and the evidence suggesting serial amateurism in leadership roles, culminating for many in frustrated professionalism dominating their retirement or alternative service decisions. Together these phenomena support the second strategy recommended above; a national framework for leadership learning that reconciles career interests, institutional needs, the need for effective system leadership, and appropriate terms and conditions of leadership

service. This strategy could also address the criteria apparently required to convert potential to aspirant leaders, incorporate the factors identified by aspirant and current leaders that actually encouraged them into leadership service, and address many of the barriers and difficulties actually encountered on entering into leadership service. Possibly the greatest impediments to the implementation of a fresh and comprehensive national framework for leadership learning will be two current norms of professionalisation: serial amateurism and equating leadership to principalship.

Nine pre-service preparatory strategies were endorsed so strongly by respondents that they should be considered as components of a leadership development policy. Three general conditions are therefore recommended: initial teacher training including classroom leadership/ECE centre leadership, work-shadowing opportunities being made available prior to applying for leadership positions, and leadership skills training being made available prior to service at each level to ensure basic competency on appointment. Six programmes are therefore recommended:

    a. a principal selection programme so that school BOTs are prepared with quality training and provided with an experienced advisor to help them select their principals;

    b. a national aspiring leaders in ECE programme available as a preparatory opportunity;

    c. a leader identification programme to encourage potential leaders to become aspirant leaders;

    d. a leader recruitment programme to encourage aspirant leaders to prepare for middle-management service;

    e. a national aspiring middle managers' programme;

    f. a national aspiring senior managers' programme; and

    g. a national aspiring principals' programme.

The degree of ambivalence by respondents suggests that an overseas leader recruitment programme or making any form of preparation mandatory would be controversial and therefore potentially counterproductive.

The degree of support for nine succession strategies suggests that they be given close consideration as components of a leadership development policy. Three are general PD conditions for all leaders:

    a. mentoring and coaching should be provided by experienced leaders;

    b. mentoring and coaching should be available for the first year of service at each level of leadership; and

    c. an annual role induction and PD opportunity for each level of leadership service should be available.

Two are targeted scholarship schemes:

    a. postgraduate scholarships to sustain middle and senior managers' learning about leadership; and

    b. master's and doctoral scholarships to sustain institution and system leaders' learning about leadership.

Four are programmes:

    a. a first-time principals' programme;

    b. principals' professional learning groups;

    c. a leaders' retention programme to enable leaders to refocus their engagement in education instead of retirement; and

    d. principals' succession planning training for chairs of BOTs.

The ambivalence over Leadspace apparently traces to four factors: leader workloads, limited utility, lack of familiarity and some alienating technical features. When 'leader workloads' is set aside, negative comments are more than outweighed by the positive, suggesting that the further development of Leadspace appears to be justified, particularly for its potential reach into remote areas and to a wider range of leader clients in education. On the other hand, the ambivalence over the KLP suggests that it might have passed its political 'use by' date as the basis for a 'professional leadership development strategy' or policy process. Similarly, the substantial ambivalence found regarding the PDPC, and its closure by the Ministry, has rendered it an implausible component of a professionalisation strategy. And given the resistance to an 'all-master's teaching profession' policy, and the importance of introducing and sustaining deep and evidence-based learning in leadership, it might best be achieved without controversy by greatly expanding the numbers of postgraduate scholarships for middle and senior managers, and master's and doctoral scholarships for institutional and system leaders. Another possibility is that the pilot Experienced Principals Programme could have been designed to enable the awarding of advanced standing in master's degree programmes.

Finally, professional associations may wish to review their services and refine delivery to meet the 16 clear expectations indicated by respondents, moving more cautiously with regard to celebrating high-quality research and innovation and engaging in industrial representation. The findings also foreshadow three potential areas of service development for professional associations:

    a. professional but not industrial representation through a national peak body of educational leaders;

    b. outreach networking; and

    c. advancing the role of professional associations in the professionalisation of leaders.

Recommendations

Given the methodological limitations discussed above, two recommendations are offered. The first is that a ministerial policy process be initiated to develop a fresh professional leadership development strategy for New Zealand. The process should be expected to exhibit the six features and employ the four strategies identified above from the international policy research into the professionalisation of leaders. Most notably, the third of these four strategies is to develop a career-based learning framework for the professionalisation of leaders. To help initiate the development of this framework, the attitudes and intentions of surveyed educators were used to refine the preliminary framework first presented as Table 3 and now shown as Table 18.

The second recommendation is that professional associations review their services in the light of the findings above and collaborate to plan delivery of professionalisation services through a new peak body.

Table 18: A revised career-based learning framework for educational leadership development in New Zealand

Career stage	Characteristic roles	Focus of learning interests	Preparation strategies, pre-service	Succession strategies, in-service
Potential leaders	Beginning teachers, *kaiako*, basic scale teachers with little current interest in offering leadership or management units	Mastery of classroom management and trialling innovations	• Initial graduate teacher training includes classroom leadership/ECE centre leadership • Work shadowing • Leadership skills training	• PD in pedagogy and curriculum development
Aspirant leaders	Fully registered teachers, *kaiako*, 'master teachers' seeking management units	Skills training in classroom and team leadership	• Work shadowing, 'acting up' • Leader identification program	• Coaching and mentoring organised locally
Team leaders	Middle-management roles: experienced teachers, *kaiwhakahaere*, teacher leaders, syndicate leaders, heads of departments, year-level co-ordinators	Team leadership and project management	• Work shadowing, 'acting up' • Leader recruitment program • National aspiring team leaders' program	• Annual induction & development conference • Coaching and mentoring program organised locally • Leadspace online resources, remodelled as LEA* • Postgraduate scholarships in leadership
Executive leaders regionally	Senior management roles: members of senior management teams, assistant principals and deputy principals	Educational management, executive functions	• Work shadowing, 'acting up' • Executive recruitment program • National aspiring senior managers' program	• Annual induction & development conference • Coaching and mentoring programme organised as LEA • Leadspace online resources, remodelled as LEA • Master's and doctoral scholarships in leadership
Institutional leaders	ECE directors, head teachers, teaching and non-teaching principals	Educational leadership and educational management	• Work shadowing, 'acting up' • National aspiring principals' program • Principal's selection program for BOTs • National aspiring leaders in ECE programme • Principals' succession planning programme for BOT Chairs	• First time principals' programme • Annual development conference • Coaching and mentoring programme organised regionally • Principals' professional learning groups • Leadspace online resources, remodelled as LEA • Master's and doctoral scholarships in leadership
System leaders	ECE senior teachers, system managers, programme leaders, advisors and consultants	System management and strategic leadership, policy-making and implementation	• Work shadowing, 'acting up' • Leaders' retention programme	• Annual induction & development conference • Coaching and mentoring organised centrally • Leadspace online resources, remodelled as LEA • Master's and doctoral scholarships in leadership

* See the OECD case study of the Austrian Leadership Academy (Stoll, Moorman & Rahm, 2007).

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Author Details

Reynold Macpherson
Reynold Macpherson Ltd
484 Pukehangi Road
Rotorua
NEW ZEALAND
Email: reynold@reynoldmacpherson.ac.nz