Leadership Succession

Planning Guide

for Maryland Schools

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MARYLAND STATE DEPARTMENT OF EDUCATION
Achievement Matters Most

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Leadership Succession Planning Guide for Maryland Schools
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Introduction

School systems across our state are committed to the importance of school leadership and know the impact that the principal and assistant principals have on student achievement. Building instructional leadership capacity in our state has been the priority of the Division for Leadership Development, Maryland State Department of Education. Unfortunately, because of the large numbers of school leaders who are eligible to retire and the numbers each year of those who choose to do so, leadership succession is becoming an imperative for all systems. In fact, at its August 2005 meeting, the Maryland State Board of Education declared the principalship a critical area of shortage. In order to address this issue in a way that strengthens leadership across a system, a strategy must be in place that is developed and implemented with an approach that ensures collaboration among many stakeholders, transparency, and continuing professional development.

For the past two years, members of the Division for Leadership Development have engaged in extensive research on the state of the art in succession planning. We engaged the services of Dr. Andrew Hargreaves, the Thomas More Brennan Chair in Education in the Lynch School of Education at Boston College, over the past two years to guide us as we explore this new arena. He has provided reading material for us and reviewed documents we sent him. He also has facilitated two sessions in Maryland, one with executive officers and another with a statewide planning team, to help us sharpen our thinking and lay out a course of action.

The *Leadership Succession Planning Guide for Maryland Schools* consists of three sections. The first is titled *Catalyst for Conversation*, and its purpose is to stimulate conversations about leadership succession in school systems. The second section is titled *Outline for Planning*. It is intended to take school system leaders beyond the conversation in a concrete manner as they develop their own succession plans. The third section is titled *Succession Plan for Example School System*, and it offers an example of what a succession plan could be. Although the example addresses each aspect of the outline, we are not suggesting that a system would necessarily approach succession planning in that manner. The school system narrative offers an example, not a model; it is an explanation of possible succession actions according to the outline. We would welcome opportunities to pilot aspects of the outline and/or example with district leaders or to work with systems to develop any aspect of the *Planning Guide.*

We believe that this *Leadership Succession Planning Guide for Maryland Schools* represents a major step forward for public education in our state, and indeed in our nation. Leadership succession is an issue everywhere, and we are hopeful that our work will inform the efforts of others as they address the issues of quantity and quality of school leaders.

Catalyst for Conversation

> ### RATIONALE
>
> **Research supports the fact that the strongest organizations have a set of beliefs and concomitant actions regarding succession.**

"The deep commitment of systems' senior leadership is essential to implement a lasting succession plan. Constructing an integrated plan, one that is collaboratively developed, clearly communicated, and consistently applied, is critical to building instructional leadership capacity. Leadership capacity must be developed and sustained to guarantee academic success for every child in Maryland's schools."

—Dr. Nancy S. Grasmick
State Superintendent of Schools

"We believe that school leadership matters, can be learned, and impacts the achievement of every student; therefore, we must have mechanisms in place to demonstrate those values, to teach leadership content and skills, and to guide us as we identify, develop, promote, move, and retain school leaders."

—Mary Cary
Assistant State Superintendent
Division for Leadership Development

"We are not at the end of history, so we need to lay the groundwork for the future now."

—Dr. Andrew Hargreaves
Thomas More Brennan Chair in Education
Lynch School of Education, Boston College
*Remarks to Executive Officers
from Maryland Public School Systems
April 7, 2005*

"A succession planning program is a deliberate and systematic effort by an organization to ensure leadership continuity in key positions and encourage individual advancement."

—William J. Rothwell
Effective Succession Planning

"One of the biggest failings of any institution is the failure to develop leadership bench strength."

—Noel M. Tichy
The Cycle of Leadership

". . . the best systems are developmentally oriented rather than simply focused or replacement oriented."

—Robert A. Fulmer and Jay A. Conger
Growing Your Company's Leaders

OVERVIEW QUESTIONS

An effective starting point for a discussion about leadership succession is a set of clarifying questions regarding system beliefs and actions.

1. What is our personal and collective philosophy about school leadership and its impact on student learning and achievement?

2. What does existing evidence suggest about the way school leadership impacts student learning and achievement?

3. Where and how do we get our most talented leadership candidates?

4. Who is at the table when we discuss leadership succession: identification, development, promotion, movement, and retention?

5. How do we recognize the positive impact of the people we are promoting?

6. How do we view the job of the principal? The assistant principal? Others in school leadership positions?

7. How do we support, acknowledge, recognize, nourish, and celebrate leadership?

8. How can we grow effective school leadership from effective classroom leadership?

9. How do our funding practices align with our commitment to leadership development?

10. How evident in the Master Plan is our commitment to leadership development?

CRITICAL COMPONENTS

During the development of a systemic plan for leadership succession, planners should consider critical components that bring about clarity, fairness, and effectiveness.

Vision

The superintendent and designated leaders communicate what they know and believe about school leaders, leadership, and its relationship to student learning and achievement.

Integrated Design

A variety of stakeholders collaborate to develop, communicate, implement, and periodically evaluate an integrated plan connected to the system vision.

Multiple Stakeholders

System leadership, human resource staff, board members, school-based leaders, central office staff, and other identified stakeholders collaborate to develop, communicate, implement, and evaluate the design.

Transparency

The vision, structure, intent, rationale, expectations, targeted audience, and stakeholders are clear to everyone in the system.

Differentiation

Varied approaches connected to the vision and in accord with differing needs and interests are used to develop the design.

Cohesiveness

System stakeholders who are designing the plan integrate succession strategies into all existing structures regarding identification, development, promotion, movement, and retention of school leaders.

Identification

1. What attributes are we looking for as we identify potential principals?
2. What processes are in place to ensure diversity among potential principals?
3. How do we develop systemwide leadership capacity without relying on discrete candidate pools?
4. What role does technology play in the identification and tracking of potential candidates?
5. What role do Executive Officers and other senior leaders have in the identification and development of aspiring and potential leaders?
6. What role does human resource staff have in the identification and development of aspiring and potential leaders?
7. What role do principals have in the identification and development of aspiring and potential leaders?
8. What role do curriculum/instructional supervisors have in the identification and development of aspiring and potential leaders?
9. What role do professional development personnel have in the identification and development of aspiring and potential leaders?

Development

1. How do we ensure that our most talented staff are getting continuing learning experiences?
2. How can we use our most talented candidates to help build system capacity?
3. How do we differentiate learning experiences according to both needs and interests?
4. What is the mechanism for supporting school leaders in the beginning stages of a new position?
5. How do we structure professional development opportunities to ensure cohesiveness?
6. How do we ensure an appropriate budget for the development of aspiring and potential school leaders?

Promotion

1. Who participates in making promotion recommendations and to whom?
2. What attributes are we looking for as we consider candidates for the principalship?
3. What are the determining factors when deciding who will be promoted to a leadership position in a school?
4. To what extent do we examine each potential promotion to ensure that we are meeting our systemwide standard of excellence in instructional leadership?
5. What time of year are promotion decisions made?
6. Why do we approach promotion as we do?

Movement

1. What is the process and connected rationale for the movement of school leaders?
2. How can we encourage effective leaders to accept positions in challenging schools?
3. Are the number of movements in key positions creating succession overload?
4. When someone is moved from one key position to another, do we consider the impact on the culture at the school where we have created a vacancy?

Retention

1. Which of our school leaders are extremely productive and are likely to look for opportunities outside of our system?
2. What other positions are available for principals in the system?
3. Do we know what our most talented people want in order to be satisfied with their positions?
4. What mechanisms can we put in place to find out what our present and potential school leaders believe regarding matters of succession?
5. What incentives are available for retaining principals?
6. How do we celebrate leaders in our system?

Outline for Planning

The following is an outline based on the Catalyst for Conversation. The purpose of the outline is to provide a guide for system leaders to develop a leadership succession plan. The overall intent of the plan is to increase the quantity and quality of potential candidates for the positions of principal and assistant principal.

I.   Current Status Descriptions

A.   Philosophy

1. The school system's philosophy of leadership and leadership development

2. The system's view of the job of the principal, assistant principal, aspiring leaders, and potential leaders

B.   Identification

1. The attributes the system needs in school leadership candidates

2. Where the system finds the majority of the candidates and how they are identified

   a.   Demographics (gender, geography, race/ethnicity, level)

   b.   Self-identification

   c.   Internal identification

3. How the system creates a pool of candidates

C.   Development

1. How the system develops aspiring and potential principals through leadership coursework and in-house professional development

2. Who makes the decisions for the focus of leadership development in a given school year

3. Who is responsible for the implementation of leadership development during a given school year

D.   Promotion

1. The current promotion process

2. The time of year when leadership succession decisions are made and why decisions are made at that time

E.   Movement

1.   The system's philosophy regarding movement of school leaders, including the frequency with which they should be moved

2.   The process for movement of current principals in the system

3.   The degree of choice principals have in accepting or rejecting an assignment

F.   Retention

1.   Data showing the stability of the principalship in the school system in terms of average length of time of service, number of principals who choose to leave the principalship before retirement, and the number of principals who leave to take positions in other local systems

2.   Current retention efforts for principals

II. Succession Considerations

A. Philosophy

1. How the *Maryland Instructional Leadership Framework* influences what the system will do to build leadership capacity and defines the expectations for instructional leadership

2. The elements of a positive, ethical, supportive, proactive culture that sustains leadership

3. The actions of the system that demonstrate the commitment required to ensure a comprehensive, transparent succession plan

4. The system's explanation to stakeholders of why leadership succession is both important and cost effective

5. A structured public relations campaign to promote respect for the principalship, communicate the importance of the position to the overall mission of the school, and explain to stakeholders why leadership succession is both important and cost effective

B. Identification

1. The interdependent roles and responsibilities of executive officers, principals, human resource personnel, instruction/curriculum personnel, and professional development specialists in the identification of leadership candidates

2. The incentive structure that encourages self-identification for leadership

3. Why and how all identified candidates, those who aspire to lead schools and those who have potential but have not expressed an aspiration to be a principal, are receiving differentiated professional development

4. Why and how the "pool" approach to identification and training is being redefined to implement a systemwide, capacity-building approach rather than a narrow group of potential replacements

5. The updated/upgraded role of technology, through the use of databases, in identifying candidates, monitoring their career paths, and tracking their professional development

6. How the system communicates its identification processes to all stakeholders

7. How the system considers external candidates only after a structured review process ensures that no internal candidate will be an effective match for a given school

C.   Development

1.   The mechanisms that are in place to assess needs, determine interests, and provide access in order to differentiate leadership development opportunities

2.   The process for including both potential and aspiring principals in the design and implementation of leadership development initiatives

3.   The process for providing constructive feedback to both potential and aspiring principals who are participating in the design and implementation of professional development and by whom

4.   How the *Maryland Instructional Leadership Framework* is integrated into leadership development experiences

5.   The potential funding sources and processes to support leadership development

6.   How the system communicates to internal and external stakeholders the processes used to support candidates for the principalship

7.   The mechanisms to establish and sustain the culture for a professional learning community of aspiring and potential principals

8.   Partnerships with colleges and universities to assure the alignment of leadership development experiences with the *Maryland Instructional Leadership Framework*

9.   The processes that are in place to ensure that principals provide opportunities for assistant principals to observe teachers, provide constructive feedback, conduct professional development, chair committees with an instructional focus, and meet regularly with the principal on strategies to improve student achievement

D.   Promotion

1.   The procedures that ensure equity, consistency, and transparency of the promotion process

2.   The interdependent roles and responsibilities of executive officers, principals, human resource personnel, instruction/ curriculum personnel, and professional development specialists in the promotion of leadership candidates

3.   How and by whom constructive feedback is provided to unsuccessful candidates regarding their performance during each stage of the promotion process

4.   The timeline that allows for planned succession and effective transitions

5.   The mechanisms that ensure a successful transition to the position of principal

6.   How this new promotion process is communicated to internal and external stakeholders

E.   Movement

1.   How the movement of principals is connected to an overarching philosophy of succession planning

2.   The research that supports the system's rationale for the frequency of movement of school leaders

3.   The interdependent roles and responsibilities of executive officers, principals, human resource personnel, instruction/curriculum personnel, and professional development specialists in the movement of principals and assistant principals

4.   The procedures for self-initiated movement by school leaders

5.   The procedures for the acceptance or rejection of an assignment by a potential principal or a principal

6.   How the school system matches a principal to a school based on the specific needs of the school and the specific strengths of the principal

7.   The attractive incentive structure that encourages highly qualified principals to move to challenging schools

8.   The process for involving the school community in the selection of the candidate for a specific vacancy

9.   How the school system stabilizes a school that has an unexpected vacancy in the principalship

10.   How the process for movement of principals is made transparent and communicated to stakeholders

F.   Retention

1.   The needs assessment that identifies what the system's most talented people want in terms of retaining them

2.   How the system determines what aspiring and potential leaders believe should be included in leadership succession initiatives

3.   Career opportunities that place value on the accomplishments of potential and current principals throughout their careers

4. Distributed leadership opportunities to impose a sense of fairness and purposeful challenge

5. The strategy for providing career counseling and support for potential school leaders

6. An attractive incentive structure that encourages leaders to remain in the system

7. The system's plan for compensating principals at a level commensurate with their responsibilities and increased level of accountability

8. The system's plan for phasing in the building manager position to reduce managerial responsibilities and increase time for a focus on instruction

9. A structured recognition and celebration of accomplishments

10. How a transparent and well-communicated process assists in retention of principals and potential principals by increasing understanding, building trust, and promoting morale

Succession Plan for Example School System

The following expansion of the Outline for Planning provides a plan that includes both the current status of an "invented" Example School System as well as what this Example School System has decided to do to strengthen leadership across the system.

In order to address the present need for increased numbers of effective instructional leaders ready to be principals and assistant principals, system leaders are encouraged to develop the outline into their own succession plan. There are many approaches to succession planning. We are offering this as an example that we hope will be helpful to system leaders as they grapple with these issues.

I.   Current Status

A.   Philosophy

Our Example School System (ESS) believes that leadership is critical to the future of our schools and our children. We recognize that with effective leadership, our ability to improve student achievement will increase substantially. We expect our principals to be instructional leaders, and we also believe that principals must be effective managers of their buildings, similar to expectations of chief executive officers in private industry.

One of the fundamental characteristics of leaders in our school system is their ability to develop and participate in effective teams through a trusting and mutually-supportive environment. Using the *Maryland Instructional Leadership Framework* as a basis for our work, we ensure that our leaders, both present and aspiring, are given ongoing opportunities for growth. We want our leaders to have high standards, surround themselves with the right people to do the job at hand, create a culture of discipline in the school, and be introspective about issues facing the school community.

We distinguish between aspiring and potential leaders in that aspiring leaders have self-identified or they have been identified by a supervisor as promising material for the leadership "pipeline." These people have accepted the challenge, and they have consciously chosen to follow a specified path to the principalship. We define potential leaders as those people who have not yet been identified but who have skills to become effective leaders if they take advantage of available development opportunities.

For the most part, this leadership development consists of a series of modules that we offer after school and during the summer, emphasizing the management aspects of the job. We expect our assistant, aspiring, and potential principals to get the instructional expertise they need as they work their way through the system in various roles.

Once our folks become principals, we provide monthly administrative meetings where we integrate professional development activities to complement the other important information being shared. We also take advantage of the various leadership development opportunities offered through the Division for Leadership Development at the Maryland State Department of Education, including the year-long Maryland Principals' Academy and the Leadership Learning Series.

We know that there is so much more we could do if we had the necessary resources. We also recognize that the "pipeline" of future leaders is shrinking dramatically, and we must approach leadership succession in a different way if we are to stand any chance of providing the kind of learning experiences for our children that they deserve. We would like to have a thoughtful, coherent succession plan as a way to change the entire manner in which we identify, develop, and promote future leaders. Included would also be procedures for moving them to different assignments once promoted and steps we take to retain those in whom we have invested so heavily throughout the leadership succession process.

B.   Identification

We find the majority of our leadership candidates in mostly traditional ways. First, many of our candidates come from within the system. Some self-identify and become part of a group that we follow and watch as they move through various roles in the system. In recent years we have gone outside of the system more and more frequently because our "bench" has become much shorter. We work with a local university to create cohorts of candidates for masters' degrees in education administration. Many of our senior staff teach these courses as adjunct professors, enabling us to ascertain the quality of potential candidates through the eyes of our own people.

The leadership selection process in our school system is fairly traditional, and in our research on other local school systems, we found that most do similar kinds of things. First, a potential candidate must express an interest in a leadership position (principal or assistant principal). This is done through the completion of an application form for the desired position. The applications are screened by our human resources department to make certain that the person has the requisite qualifications. Once a year, usually in the early spring, we conduct interviews for all qualified candidates. This interview process includes a timed writing sample on an assigned question as well as a formal interview with a panel chosen for their familiarity with specific positions. The interview panel establishes a cut score. Any person falling below that score is not

considered for a leadership position. All persons who make the cut score are included in our pool of acceptable candidates.

C. Development

To develop potential and aspiring leaders, we collaborate with local universities in providing opportunities for our candidates to take the necessary coursework in order to receive their Administrator I and Administrator II certification as required by the Code of Maryland Regulations. For potential and aspiring principals, we also have a series of modules that have evolved over the years that we offer as after school and summer opportunities. Our county-wide professional development staff, along with experienced principals, implement these various training activities. These modules focus on the management responsibilities of principals, e.g., law, budget, and facilities.

The executive officers, in consultation with the deputy superintendent, have the ultimate decision-making responsibility for the focus on professional leadership development in any given year. Current principals receive training in our summer workshops. They also receive limited training during our monthly administration meetings throughout the year. A committee of principals makes recommendations on the focus of such activities for a given year, but it is the executive officers and the deputy superintendent who make the final decision.

D. Promotion

The ESS has followed the same basic processes and procedures for promoting leaders for many years. We have traditionally used a "pool" approach for the identification of candidates.

Interviews are completed in the spring, and the new list of "pool" members is finalized at that time. Consideration of these new candidates for promotion along with candidates from previous pools usually begins around the first of June.   At the same time we are making promotion decisions and expect effective transitions to take place between outgoing principals and newly promoted principals prior to July 1.

E. Movement

We move principals based on a need in another school or an issue in the principal's school. Executive officers make a recommendation to the deputy superintendent when they feel that a principal should be moved. If the deputy superintendent agrees, then the principal is called in for a conference with the executive officer and asked to sign a form acknowledging that he/she knows that this recommendation will be forwarded to the superintendent and the board of education for approval. The principal has some input in this decision; however, it is considered a prerogative of the superintendent based on what he/she feels is best for the school system. Once the decision has been made, the principal cannot decline the recommended transfer.

F.   Retention

Our data enable us to make some broad generalizations about our retention rates, and these data seem to be in keeping with what is occurring across the state. First, our principals are getting younger. The reason for that appears to be that we have fewer qualified candidates in the pipeline, forcing us to promote people earlier in their careers. Second, we believe that our principals are leaving the principalship earlier than in the past. Though we do not have sufficient trend data to make a definitive judgment in this regard, we believe that the number of vacancies we must fill each year is primarily the result of retirement eligibility but in some cases a result of increasing time demands and accountability issues regarding the job.

We try very hard to keep our salaries competitive, and our benefits package for principals is comparable with most other school systems. We provide professional development opportunities throughout the school year. We also try to send our principals upon request to at least one conference a year. Compensation for assistant principals remains stagnant, so we recognize it as an area that we must address in our planned succession model.

II.   Succession Considerations

A.   Philosophy

We recognize that we exist in a knowledge society, and that those in leadership positions with the most knowledge are more likely to succeed. We further recognize that leadership for 21st century schools must prepare students to be competent and competitive in a global society. In this age of unprecedented accountability in education, we must inspire and develop our leaders to a level that will enable them to meet these challenges.

Systemic Capacity Building

We are comfortable with our philosophy of leadership, even though we believe that we do need to move towards more of an emphasis on instructional leadership as called for in the *Maryland Task Force on the Principalship*, the *Visionary Panel for Better Schools*, and the research-based *Maryland Instructional Leadership Framework*. We believe that our struggle to attract a sufficient quantity and quality of people for leadership positions is directly related to the overwhelming expectations of the position. In that regard, we are no different from many other organizations. The traditional response to this dilemma has been to *find* replacements for vacant positions. The fundamental shift in our overall philosophy is to *develop* those replacements in a planned, systematic way. Rather than having a list or a pool of individuals who are waiting for promotion, we have adopted the philosophy that we can engage in systemic capacity building if we embrace the planned development model. We need to build the capacity of our school district on a broader foundation, for we believe that as we expand our capacity building efforts, we will strengthen the quality of our entire system.

Building Managers

Our primary shift in philosophy regarding what we expect of principals is that they must be first and foremost instructional leaders. We must find the resources to create positions in our budgets that are designated as "building managers" assigned to principals. This has been a major recommendation of the Maryland State Department of Education since the 2000 *Report of the Maryland Task Force on the Principalship* and the 2003 *Report of the Visionary Panel for Better Schools: Achievement Matters Most*. The position of building manager would go a long way in clearing the plate, allowing our principals to have the time they need to be instructional leaders. This position would also remove many of the non-instructional duties given to assistant principals, thus giving them more time for acquiring the skills necessary to be instructional leaders.

Since we will not be getting funding for additional positions, we are looking systemwide for vacancies and other positions that can be converted into building manager positions. If we do not find enough positions systemwide, we have charged our executive officers with finding one position per school that

could be used for this purpose. Executive officers and the principals are expected to collaborate in this effort. We expect that .5 for this position will come from somewhere in the current school staffing allotment. The other .5 will come from the executive officers' staffing allotment. We are so committed to this effort that we have described it in detail in our Master Plan. Of critical importance to our shift in philosophy has been how we have embraced the *Maryland Instructional Leadership Framework* as the foundation document to define our expectations for instructional leadership and to build leadership capacity across our system. Not only will we assure that our principals take advantage of all training opportunities from the Maryland State Department of Education, our professional development office has been charged with ensuring that the outcomes and evidences in practice from the *Framework* are assimilated in as many internal training opportunities as possible. Additionally, we have instructed our principals to use the *Framework* as the basis for school-based professional development activities. Our hope is that immersion in the evidences in practice will provide guidance to teachers and set clear expectations.

Framework as Content for Professional Development

Although we believe that we have attempted to foster a positive, ethical, supportive, proactive culture that supports leadership, we have decided that we need to assess how our principals feel in this regard. We have developed a very simple survey (Attachment A). Their responses will be anonymous, the surveys will be received by our professional development office, and the results will be tabulated and shared with senior staff at one of our leadership meetings. We will analyze these results and take immediate steps to address issues that are raised and to implement suggestions as practicable. We will prepare a response to the survey results that will be shared with principals in one of our monthly administrative meetings. We recognize that this survey is risky in the sense that we may not hear what we would like to hear, but the risk is very much worth the reward in our view.

Principals Surveyed on Culture

A major part of this succession plan deals with the retention of talented people in our school system. We acknowledge that part of the "pipeline" problem has to do with losing far too many people to early retirement or to competing school systems. We must find ways to encourage our best and brightest to stay with us, and we must make it worth their while to do so.

Our system is committed to developing a comprehensive, transparent leadership succession plan. This succession plan document will be shared with our local Board of Education and referenced in our Master Plan. And finally, we will do an annual summary of achievements under this succession plan that will be shared publicly on our website to assure that all stakeholders are aware of the results of our sustained leadership succession initiatives.

Succession Plan Referenced in Master Plan

As we embark on leadership succession as our preferred mode of operation, we must convince our stakeholders why this is critical to the future success of our system. This involves a thoughtful and comprehensive public relations campaign that will have several expected outcomes:

Comprehensive Public Relations Plan

- Promote respect for the principalship.
  We will address this through the public relations effort to influence our various stakeholders to appreciate the enormous responsibility of a school principal.

- Communicate the importance of the position to the overall mission of the school.
  It is critical that everyone understands that we cannot have great schools without great principals. The role of instructional leader must supersede all other duties.

- Explain why leadership succession is both important and cost-effective.
  We must convince our various publics of the extraordinary costs of losing great principals and aspiring leaders, and we need to be able to explain how building capacity strengthens the entire system.

Like all local school districts, we face many challenges, not the least of which is the funding issue. We believe that this issue requires an aggressive approach in the form of a line item in the budget for professional development with a percentage of that line item earmarked for leadership development.

B. Identification

Interdependent Roles and Responsibilities

As we moved to a planned succession model, the very first thing that we recognized was the interdependent roles and responsibilities that executive officers, principals, human resource personnel, instruction/curriculum personnel, and professional development specialists have in the identification and ongoing development of candidates for leadership positions.

Principals' Role in Identifying and Developing Potential Leaders

First, we ask that principals identify persons on staff with leadership potential. Once identified, the principal is responsible for making certain that these persons are assigned a variety of experiences over time that will allow the person to assume formal and informal leadership roles, learn instructional leadership content and skills, and continue to grow professionally. This is especially true for developing the competency of assistant principals by providing opportunities for immersion in instructional leadership. Ultimately, the goal for the principal is to get as many quality

candidates as possible to apply for leadership positions. We are revising our evaluation instrument for principals to include a component for the identification and development of potential leaders in their schools.

Human Resources' Role in Identification and Development of Potential Leaders

Human resources personnel have a key role in leadership succession. They manage the hiring process and are often the first person with whom a new teacher comes in contact.   They have access to the personnel files, including information on the kinds of professional development activities the potential leader has experienced through the Leadership Development Data Tracking System. Human resources personnel will participate in ongoing conversations about potential candidates for leadership positions, and they will be at the table when promotions and transfers are being considered. We believe that the role of the human resources department is so significant that the director for human resources will now have as a major responsibility the coordination of the leadership succession effort during the identification phase of the plan. All managers in the human resources department will have a component on their annual evaluations for the identification and development of potential leaders.

Executive Officers' Role in Identification and Development of Potential Leaders

Executive officers as defined in the Code of Maryland Regulations have direct supervisory responsibility for principals. As we move from the identification phase towards the promotion and movement phases of our plan, the executive officers and the deputy superintendent will assume primary responsibility for our succession planning efforts. We expect our executive officers in their conversations with principals to seek their opinions on potential future leaders. In their visits to schools and classrooms, we encourage our executive officers to visit the classes of these potential leaders and to observe them as they deliver school-based professional development for staff. The executive officers' annual evaluation will include a component for the identification and development of potential leaders for the schools assigned to their areas.

Professional Developers' Role in Identification and Development of Potential Leaders

Our professional development staff will be deeply involved in succession planning. They are expected to assist in identifying potential leadership talent through the various professional development activities in which they are involved. They will be asked to advise leadership on a regular basis as to how potential and aspiring leaders are participating in and/or facilitating professional development opportunities. Whenever they serve as team leaders for professional development experiences, they are also expected to provide our aspiring and potential leaders with feedback on their professional development work. They will bring to the table, in monthly meetings with the director of human resources, the names of people throughout the system who have demonstrated such potential

as a result of professional development opportunities that we make available to all professional school system employees. These names will be given by the director of human resources to the executive officers. Professional development personnel will have as a component on their own evaluations, the identification and development of potential leaders resulting from their contacts through internal professional development opportunities.

Finally, we expect that our key instructional/curricular staff will be involved in the succession planning effort. Our content supervisors regularly monitor the classroom performance of teachers in their respective disciplines to determine their instructional strengths and their adherence to the written curriculum. They also monitor curriculum writing during the summer months, and thus have the opportunity to see potential candidates through a different lens. They review this performance with principals upon completing the observation, and part of that conversation is a discussion about leadership potential of the observed teacher(s). Like all of the other players in this effort, these instructional/ curricular staff members will have as a part of their annual evaluation the effectiveness of their role in the identification and development of potential leaders.

Content Supervisors' Role in Staff Development

Incentives

It is critical for us to have in place a variety of measures that will provide incentives for people to self-identify for leadership positions in our school system. In our view, the same incentives for retaining people in leadership positions also serve to create a sense of desire in potential leaders to follow a leadership development path. (See Section F, Retention.)

Redefining the Pool

Although the pool has historically been our system's primary identification mechanism, we have decided to abandon that approach for identifying candidates both for the principalship and for the "bench" (assistant principals). Our rationale is that the pool approach is no longer able to guarantee a sufficient supply of candidates in the pipeline, and we believe that planned succession efforts will go a long way to building capacity throughout our system instead of focusing our professional development efforts on one group of candidates.

Instead of a discrete pool, we will expand the number of people to whom we will provide leadership development opportunities, guide the development of personal portfolios, and continue to encourage them to pursue leadership opportunities. Our "pool" consists of all of the potential and aspiring leaders in our system; therefore, we do not call this systemic approach a pool approach to leadership. By broadening the scope of our efforts to include those aspiring to

Pool Strategy Replaced with Broadened Strategy

be principals as well as those with potential to be assistant principals, we hope to get more people interested in leadership by providing them experiences for which they are ready and interested. At the same time, it will allow the system to get a very good look at their potential through the eyes of the interdependent group of personnel mentioned earlier.

We will use the data tracking system (see Section C, Development) as well as annual evaluations and recommendations from the parties described in the interdependent roles and responsibilities section to assist us in making decisions about who is ready to be promoted to a leadership position. We will work with our unions and our own personnel to help them understand why we have adopted this new philosophy.

Technology

Technology will play a major organizational role in our planned succession model. For our leadership succession efforts, we will expand the use of our present database to include the various leadership experiences of potential candidates. We will use the employee identification number in helping to facilitate the identification of candidates, the monitoring of career paths, and tracking of professional development. For instance, each principal will designate a staff member to maintain a potential leader database that will detail all of the school-based leadership opportunities that a particular staff member has had. The human resources database will be integrated with the principal's database in a manner that allows human resources personnel to access information so that a complete picture can be shown of each potential leader's school-based leadership experiences.

Maintenance of Potential Leader Database

Communication

We will describe to our various stakeholders how we intend to identify candidates in the future. We will meet with our teachers' union and administrators' union to explain the redefined process. We will distribute a special newsletter to all employees outlining the major elements of our newly developed identification efforts and how they affect current employees. When we hire new employees, we will make part of their orientation program a complete description of our planned succession efforts so that they understand our underlying philosophy of systemic capacity building. Finally, we will make our funding authority, the county council, aware of our efforts and solicit their support for our redesigned leadership succession model.

Newsletter and Orientation of New Employees

C. Development

Needs Assessment

We believe that each candidate has unique experiences, needs, and interests which we must recognize if we are to prepare properly the next generation of leaders. As a result, we have developed a needs assessment package (Attachments B, C, and D) that allows us to identify specific individual requirements. Using a tracking mechanism (Attachment E), we will also be able to determine where each candidate is on the continuum and what types of training are still required in order to be adequately prepared.

The needs assessment package is in three sections and is intended to be a 360° type of exercise. The candidate will first complete a self-assessment and then provide a selected number of colleagues with the Observer Assessment for School Leadership Candidates instrument. The candidate will collect and review the observer instruments and revise his/her own self-assessment instrument as desired. The candidate's supervisor will also complete an Observer Assessment for School Leadership Candidates instrument. The supervisor will then meet with the candidate and compare the various assessments. Using Attachment C, the supervisor and candidate will reach consensus on the instructional leadership needs assessment, which will be updated annually and will become the basis of the candidate's professional development plan. The supervisor and candidate will also collaborate on completing the Collaborative Assessment of Management Development Needs (Attachment D).

360° Needs Assessment

Leadership Development Data Tracking System

We have created a comprehensive Leadership Development Data Tracking System that has multiple components. Our Human Resources Department is responsible for maintaining this system. The first component of the system is the Individual Data Form (Attachment E). Human Resources will maintain this form for all potential leaders. This system also includes current credentials, qualifications, up-to-date recommendations, evaluations, and various other forms found in this succession planning guide. Our interest is to house in one place all of the critical information we need on potential leaders to help us make informed, equitable, consistent, and transparent decisions.

Leadership Development Data Tracking System

Leadership Development Design and Implementation

It is critical that our present, potential, and aspiring principals are included in the design, delivery, and implementation of leadership development initiatives. We consider this participation to be valuable professional development. The principals and candidates will be expected to assist in the implementation of the designed professional development

Principals and Candidates Involved in Professional Development

experience because we want all principals to know how to deliver professional development.

We consider instructional leadership to be the primary responsibility of principals in our school system, and we consider the *Maryland Instructional Leadership Framework* to be our guide in this effort. Accordingly, we place great emphasis on developing in our candidates the skills necessary to be the kind of instructional leader identified in the outcomes and evidences in practice found in the *Framework*. We continue to send potential and aspiring leaders to professional development opportunities sponsored by the Maryland State Department of Education. Principals must facilitate on-site opportunities for assistant principals in instructional leadership by allowing for job shadowing, co-observing and mutually determining feedback, modeling feedback conferences, designing and conducting professional development for staff, chairing committees with an instructional focus, and meeting regularly with the principal to examine data and discuss strategies to improve student achievement.

Primary Responsibilities of Instructional Leadership

In addition, we will provide our potential and aspiring leaders development in the area of management responsibilities and other topics of interest necessary for leaders to do their jobs. The general list of these topic areas can be found in Attachment D, and this list will continue to change over time as new areas are identified.

Feedback

The process of providing constructive feedback to potential and aspiring principals who participate in the design and implementation of leadership development activities is critical to the growth of these individuals. Because the participant's immediate supervisor may not be part of this exercise, we believe that the feedback needs to come from the person who has the lead in the planning of the identified activity. That person is responsible for conducting a conference with the aspiring or potential leader once the activity is planned and implemented. Because there is no supervisory relationship, there will be no written record of this conversation; it is for personal development purposes only.

Constructive Feedback to Promote Personal Development

Funding Sources

The proof of our commitment to professional development can be found in our budgeting priorities. We have established a line item in our budget for professional development that will never go lower than 1% of the total budget. Of this amount, we are committed to maintaining a minimum of 25% of that amount for leadership development. We intend to make the case to our funding authorities that this amount cannot be cut if our elected officials, parents, community and business leaders, and others want to see acceleration in student achievement for all subgroups.

Line Item in Budget

Communication

We believe that our various stakeholders need to be reassured
that those persons we place in the position of principal are ready
to assume the required responsibilities. We are particularly
concerned that in tight budgetary times there is a tendency to cut professional
development funds from most budgets. In order to minimize that possibility
and at the same time instill confidence in those we serve, we will engage in a
public relations campaign to emphasize the critical role that principals play in
positively affecting student achievement. Our director of communications will
be responsible for the following activities in our public relations campaign to
help shape the positive image of principals in our system:

Communication Strategies

1. Public service announcements on the critical role that principals play
   in improving our schools

2. Strategic issuance of "Good News" releases showing the impact that
   specific principals have had in their schools

3. Reference to the importance of school leadership in all public
   speaking engagements of senior leaders

4. The development of a brochure that describes how principals are
   prepared (including preparation by institutions of higher education as
   well as internal leadership development activities)

5. The inclusion of a highly visible section of the system website that
   describes the critical role played by principals

6. Timely submission of op ed pieces about how the system develops
   principals

Sustaining a Professional Learning Community

We believe that participation in professional learning
communities enhances the growth of participants. For that
reason, we are committed to establishing professional learning
communities for each of the leadership development activities
offered throughout the school year. Each person involved in the
design and implementation process as well as those who participate in the
activity itself will be part of that specific professional learning community. The
expectation will be that the activity does not start and end with the completion
of a specific event. Rather, it continues throughout the year with regular
electronic communication and face-to-face communication as desired and
practical. Participants may be part of multiple professional learning
communities depending upon the number of leadership development activities
in which they are engaged. The person with the lead in each activity will have
the ultimate responsibility to make certain that the professional learning
communities are established and sustained throughout the experience. We are
hopeful that these communities will also help build a network of colleagues
upon whom potential and aspiring leaders can depend as questions arise.

Participation in Multiple Learning Communities

Partnerships

We have established multiple cohorts for potential and aspiring leaders with our local university. It has aligned its education administration program with the *Maryland Instructional Leadership Framework*, so we are confident that our potential and aspiring principals who go through this program will receive the kind of instructional leadership training needed to complement what we offer as a school system and what MSDE is able to provide.

Leadership Development School

One example of an extraordinary partnership in our school system has been the evolution of Professional Development Schools (PDS) for the preparation of classroom teachers. These schools have been in existence for over five years now, and we are extremely impressed with the results. They provide us with a steady stream of potential new hires, and they also have shown over time to yield teachers who are most likely to remain with us for a long period of time. The first and second year attrition rate of teachers who have come out of this program is indeed minimal.

We believe that we can replicate that success with school leaders by creating a Leadership Development School in our district. We have not worked out all of the details of such an effort yet, but we are committed to partnering with our local university to explore the possibilities. The deputy superintendent has been charged with convening a broad stakeholder group to develop a comprehensive plan in this regard. It is our hope that a leadership development school will allow us to build the bench once again, provide school leaders who will remain in their positions over an extended period of time, and allow for excellent leadership development experiences across our county.

Using PDS Model for Design of Leadership Development Schools

We are also willing to partner with another local system if we find that this effort is more than we can do alone or if our design would be more effective with the additional partnership. We envision the leadership development school being a combination of graduate course work, action research, and a wide variety of practical, hands-on leadership experiences (e.g., an internship) under the careful guidance of an outstanding instructional leader. The *Maryland Instructional Leadership Framework* will be the underlying basis for the work of this leadership development school. Our initial review of the literature suggests that this may indeed be a groundbreaking initiative across the country. We are excited about the possibilities, and we plan to pursue aggressively the establishment of such a school in order to help provide us with high-quality school leaders for decades to come.

D.   Promotion

Equity/Consistency/Transparency

Our primary objective as we move forward with planned succession must be to assure equity, consistency, and transparency in our promotion process. The first step in creating equity, consistency, and transparency is for our human resources department to conduct a general review of potential candidates in our Leadership Development Data Tracking System (LDDTS). Because this is an open system to which all employees have access to their own information, we believe that we have created the first step in a fair system. We will consider each candidate's learning experiences recorded in our LDDTS as we make promotion decisions.

Use of Tracking System to Inform Promotion Decisions

Those whose data sheets demonstrate initial readiness will have their personnel files screened by human resources one final time to assure that they qualify for the positions we seek. Assuming they do qualify, they will be notified in writing that they are under consideration for possible promotion and provided a Leadership Interest Form (Attachment F), which they will have to complete and return to let us know if they wish to be considered for promotion. Likewise, those not being considered will be informed in a personal conference with their immediate supervisors and provided information as to what paper credentials and/or learning experiences they need in order to be considered. We believe that this procedure will provide us equity, consistency, and transparency through this stage of the promotion process.

Involvement of School Community

We want community input on the kind of principal they want and the kinds of things they want to see changed in their school. We want those communities to be an integral part of the process, and we also want them to be advocates for our leadership succession efforts.

Since we intend to handle promotion and movement decisions at the same time, we would want school community involvement regardless if there is a vacancy created by a resignation or retirement, or whether it is because of our intent as a system to move that principal or assistant principal to another school.

As soon as we know that there will be a vacancy in a school (principal or assistant principal), we will notify the Parent-Teacher-Student Association or whatever comparable group exists in the school. We will ask them for a list of the attributes they consider most important for a new principal in their school. We will also ask that group to inform the executive officer in writing what they consider to be the most significant challenges

School Communities Communicate Priorities for New Principal Selection

faced by the school and what they consider to be possible approaches to dealing with those challenges. Assuming the timeline works well, this will usually be done between the time we are notified of a vacancy (about February 1) and the time when we anticipate making replacement decisions (about March 1). This input will be considered by our Succession Review Team — executive officers, the director of human resources, and instruction/curriculum personnel — as they make recommendations for promotion and movement of principals.

Promotion Decisions

As previously stated, we believe that a variety of personnel have interdependent roles and responsibilities in making promotion decisions so that we can maintain the equity, fairness, and transparency we seek. Once the submission date has passed for receipt of the Leadership Interest Forms (January 31 of each year), we will have our new cohort of candidates from which we will make promotion decisions. At this point, we will assemble our Succession Review Team to screen all of the candidates once again. This review includes the data sheets from the Leadership Development Data Tracking System, credentials, qualifications, annual evaluations, and recommendations from immediate supervisors. The director of human resources has the responsibility to assure that all recommendations are available.

Succession Review Team

Each candidate will be discussed individually by this Succession Review Team, and this team will identify those candidates who have demonstrated a readiness to move to the final stage prior to a promotion recommendation. We have decided that a review requiring candidates to answer a given number of questions in a prescribed time is not comprehensive in terms of what we are looking for in our instructional leaders. Therefore, our final steps in the process are an Oral Portfolio presented to a small team that replicates the representation on the Succession Review Team and a timed writing sample.

Oral Portfolio

The Oral Portfolio will be delivered to the team within a 45 minute period. The content will include such aspects as an overview of their experiences in developing and implementing professional development; examples of their data-driven decision making work, including root cause analysis; a descriptive experience involving the teaching-learning processes and content; and how they have used the *Maryland Instructional Leadership Framework* to self-assess and guide their work. The process must include the integration of technology in the presentation. In addition, each candidate will discuss his or her level of expertise with specific instructional levels, demographics, and specific populations so that appropriate school matches are more evident.

We believe that the ability to communicate effectively both orally and in writing is critical to the principalship. We see the timed writing sample as a preferred

means to determine the writing skills of our candidates. The Succession Review Team will determine the topic for the writing sample. This team will also design a scoring rubric to include both writing skills and content germane to the position for which the candidate is applying.

The review teams will make recommendations "to promote" or "not yet ready to promote" to the Succession Review Team. That team will then make final recommendations for promotion and specific placement of personnel to the Deputy Superintendent. In making these recommendations, the Succession Review Team will do its best to match candidate strengths to school needs. The deputy superintendent will take the recommendations to the Superintendent, who will make the final decision regarding the names he/she wishes to forward to the Board of Education.

We hope to be able to make the majority of these decisions in February. However, because vacancies will emerge during the spring and summer, the Succession Review Team will meet monthly from February until schools open with all principals and assistant principals in place. We recognize that there is still subjectivity to this process, and we believe that no matter what process we put in place, there will always be a degree of subjectivity. Our goal is to remove as much of it as possible, while at the same time bringing equity, consistency, and transparency to the process.

Once the superintendent has approved the promotions, the appropriate executive officer will meet personally with selected candidates to let them know of the proposed assignment. We may or may not have an alternative placement for a person who declines, and the declination will not be held against the candidate in future promotion decisions. If the candidate accepts, he/she will sign a consent form (Attachment F), which will allow the name to be passed on to the Board of Education. If for some reason the candidate turns down the promotion offer, the executive officer will communicate that to the Succession Review Team at one of its monthly spring meetings. The executive officer will also be responsible for identifying alternative recommendations for the proposed assignment should the superintendent so desire.

Candidate Consent

Feedback

Part of the equity, consistency, and transparency issue in our view is our ability to provide constant feedback throughout the promotion process to those who seek leadership positions. As we begin to develop potential leaders, the degree of feedback increases considerably. Candidates receive feedback through the 360° feedback forms. They also receive feedback from their immediate supervisors on both their instructional as well as their non-instructional needs. They receive additional written feedback from their team leaders who are responsible for completing the confidential Feedback Form for those candidates who take part in a leadership development design team or a leadership development implementation team.

As we move through the promotion process, we notify those candidates who have been chosen to move beyond the paper readiness stage. We conduct a conference with all who did not move on to the next stage to inform them what they must do to be considered in the future. The potential leader's immediate supervisor is responsible for conducting this interview based on a conversation with the appropriate executive officer.

Conferences with Candidates Not Ready for Promotion

Transitions/Timeline

One of the most serious issues we face is the difficulty in providing sufficient time for an effective transition of leadership. We must find ways of moving the timeline backward so that decisions are made much earlier than June of a school year. At a minimum, we would like to have a three-month window for successful transitions to take place. It is our intent, if we know about a retirement far enough in advance and if practical, to move the person we intend to promote to that school for a full year's transition with the outgoing principal. This will require us to conduct business differently. First, we will have to encourage our employees who have made a decision on retirement to inform us earlier than in the past. We would like to be notified of these decisions no later than February 1 for the subsequent school year. We believe we can get most of our current leaders to cooperate with us if we can describe why it is important to us and how we are changing the way in which we make promotion decisions. We must, however, rely on the good will of our current principals in this regard, and we truly believe that they will cooperate fully with this request for the good of their schools and their children if a positive, supportive, healthy culture is in place.

Aggressive Timeline

Communication

Using the same vehicles and media mentioned earlier in the plan, we will communicate our promotion efforts in a similar fashion. Simply stated, we believe that communication is the linchpin for transparency.

E. Movement

Overarching Philosophy

It is also important to us that whatever we decide to do in the future regarding the transfer of principals and assistant principals be connected to an overarching philosophy of succession planning. We have come to believe that stability in our schools and our school communities is more important than regular movement of principals. We need to view our schools as a portfolio rather than separate entities because every transfer affects at least two school communities – the one from the sending school and the one from the receiving school. Often entire feeder systems are affected by movement of principals.

Schools Viewed as a Portfolio

If we are to take seriously the transition period we desire for our principals, we will have to make thoughtful decisions much earlier with the advice and input from a variety of people, most importantly the affected principals and assistant principals. This is a practice we feel we must adopt as we attempt to build the bench once again.

<u>Supportive Research</u>

Research tells us that change takes time, particularly if that change is to be sustained. Moving a leader in the middle of a change effort, for the most part, takes the school backward rather than forward. Hargreaves and Fink (December 2003) suggest that it is not the leaders who let their schools down, it is the system in which they lead. Systems must pay attention to sustainable leadership if change itself is to be sustained. Sustainable leadership, they say, is a shared responsibility that does not deplete resources and that cares for the surrounding community. They also suggest that leadership succession is the last challenge of leadership, since one is planning for one's own obsolescence.

> **"We are not at the end of history, so we need to lay the groundwork for the future now."**
> —Dr. Andrew Hargreaves
> Boston College

We could find no research that supports the frequent movement of principals or assistant principals. We are convinced by the research and literature in the field that we need to be more proactive in the way we approach the transfer of principals and assistant principals because of the inevitable consequences that follow such movement.

<u>Movement Decisions</u>

As we have described in a previous section, we believe that a variety of people have interdependent roles and responsibilities in making decisions on the movement of principals and assistant principals. Our executive officers will have the primary role in forwarding the names of principals they believe should be moved to the Succession Review Team. If it is an assistant principal who is to be moved, the executive officer will collaborate with the principal in forwarding that recommendation. It is critical, we believe, that principals play a major role in determining who will be on their Leadership Team since it is the responsibility of the total team to lead the focus on teaching and learning in the school. In both instances, the affected persons will have had multiple conversations with their immediate supervisors long before this occurs. The Succession Review Team will be the same team that makes promotion recommendations since they are matching all qualified candidates with schools. Both promotion and movement will be considered together so that decisions can be made that strengthen the whole system.

> **Matching Candidates to Schools**

> **Principals' Voice in Assistant Principal Selection**

There are many factors that go into our decisions as we attempt to match leaders with schools. Certainly, we look at the demographics of each school. Most importantly, however, are the test data that show trends in student performance in subject areas and among specific subgroups of students. We also pay much attention to the experience level of the teaching staff, and the specific areas in need of improvement and growth.

Choices

Although the superintendent will make the final decision, we have come to believe that a person being moved should also have input on that movement decision. Essentially, we may still need to move the candidate, but we will listen to the appeal. Where appropriate, we will offer alternative placements. That is why it is so important to us that the conversations between the person being moved and his/her immediate supervisor begin early. If the person being recommended for movement wishes to decline the transfer, we want to have in place a method to deal with such requests. We also believe that we need to have a mechanism in place whereby an individual can request a transfer, once again in a "no-fault" manner. We are committed to accepting such self-initiated transfer requests in order to help keep our leaders motivated and energized. In either case, we will have a sign-off form for all persons being moved in a given school year (see Attachment G).

"No Fault" Decline of Offer

Timeline

Similar to the manner in which we have chosen to promote individuals to the principalship, we wish to move up the timeline for the movement of principals as well. We recognize that moving up this timeline creates other possible issues (e.g., "lame duck" status), but in the final analysis, we are convinced that the multiple benefits of successful transitions far exceed the problems created by early announcements. Accordingly, we intend to make final decisions on the promotion and movement of our principals and assistant principals no later than March 1 of each year, thereby allowing for effective transitions to new positions.

Incentives for Challenging Assignments

There is a need to provide incentives in order for skilled leaders to be willing to assume positions at our most challenging schools. For the one school that our system has in Restructuring Planning as a result of *No Child Left Behind*, we plan to take advantage of the statewide Distinguished Principals' Program resulting from House Bill 995. This program provides a healthy financial incentive for distinguished principals to assume the principalship of schools in this improvement status.

Distinguished Principal Fellowship Program

We also have a number of other challenging schools in our district that are not in this improvement status yet, but for which we need outstanding principals. We must find a way through local funds to provide incentives for our own best and brightest to want to lead these schools. We will seek a similar but slightly lesser stipend from our county council so that we can replicate the statewide program in our own schools that have not yet reached that status.

Stipends for Leaders of Challenging Schools

Communication

We believe that the movement of principals may be the most challenging part of this communication plan because of the strong feelings that such movement creates. Whenever a principal is to be moved to a new assignment, we will take the following steps:

Communication Strategies

- Immediately upon the announcement of the transfer of the principal, the executive officer will attend a special staff meeting at both the school losing the principal and the school receiving the principal to describe the process for making the decision. Community representatives will be invited to this meeting.

- Assurances will be provided that the transfer was planned in a thoughtful manner and that both schools will receive much attention to make certain that the transition goes smoothly.

- The transition will include a comprehensive checklist of topics that need to be discussed by the departing and the arriving principals. This checklist will be shared with the executive officer, and there will be another checklist of topics that need to be discussed between the executive officer and the two principals. These checklists will be consistent countywide, but there will be open-ended questions as well to allow for individual circumstances.

F. Retention

Satisfaction/Needs Assessment

One thing that we hear from our principals is that they want and need to be more involved in the placement of assistant principals in their schools. We believe that this is a job satisfaction issue that deserves attention. Therefore, as mentioned under "Movement Decisions," we intend to include principals in discussions about the selection, placement, and movement of these critical Leadership Team members. In addition, the principals' voice in the process will be a plus for encouraging assistant principals to consider the principalship and for encouraging potential leaders to consider the assistant principalship.

In order to ascertain what would help us retain our potential, aspiring, and current leaders, we have developed a Leadership Satisfaction/Needs Assessment instrument (Attachment H) to be completed anonymously. This instrument will be distributed in July of each year to all current leaders as well as those who have been identified as potential or aspiring leaders. It will help us prioritize our retention efforts, since we do not have the resources to do everything we would like to do in this regard. We will use the results of this needs assessment as we develop our funding requests to the county council for the following school year.

Prioritizing Retention Efforts

Career Opportunities

The connotation of a career ladder suggests that one moves from one position to another in a vertical manner on the organizational chart. We do not have a sufficient number of positions to create such career ladders in the traditional sense of the word. We do, however, move people through various leadership positions in schools. We also provide multiple opportunities through our belief in distributed leadership, creating a sense of fairness and purposeful challenge, for people to develop their leadership skills at the school level as well at the central office level. Our metaphor, however, is more like a bridge than a ladder since it is more horizontal than vertical. There are places where a person definitely moves up the ladder, but there are many more places where potential leaders participate in various learning experiences, thereby developing skills that will eventually put them in position for that vertical movement. This is what we consider the bridge to leadership positions, and we are comfortable with that metaphor since many more people can fit on a bridge at one time than on a rung of a ladder.

Career "Bridges"

Career Counseling and Support

It is important to us that we provide effective career counseling and support for our potential and aspiring leaders as well as our assistant principals and principals. Veteran principals tend to find their own support systems the longer they are in the position.

We believe that our principals are the first line of support for potential or aspiring leaders as well as assistant principals assigned to their staff. They should be facilitating career counseling to these personnel and providing the kinds of experiences that will make them well-rounded leaders. Of course, our director of human resources and executive officers are also expected to provide counseling support as appropriate. Each of these positions (principals, director of human resources, and executive officers) will have a component as part of their annual evaluations that speaks to how well they provide this support.

Executive officers are also directly responsible for providing career guidance and counseling to principals. When a principal is new, the executive officer will spend considerably more time in that building than in those where there are successful principals. Since executive officers are not always available, and since the very nature of the reporting relationship may make a principal more reluctant to be totally candid with his/her supervisor, we will assign each first year principal a mentor. This mentor will be responsible for meeting at least weekly with the new principal to discuss anything that the new principal wishes plus items on an established timeline-based agenda of needs. The mentors will be recently retired principals to whom we will pay a stipend for this work.

Mentors for First Year Principals

Incentives

We are more convinced than ever that we must have in place an attractive incentive package that encourages potential leaders to consider a leadership track and at the same time to help retain the leaders we have. We believe adding building manager positions will be a major incentive. In order for these positions to become affordable, we will look across the system at present possibilities, and, where possible, convert positions and vacancies into building managers. These will be non-certified personnel so that salary and benefits will be less.

We do not believe that even this major step forward is enough. The *Maryland Task Force on the Principalship* and the *Report of the Visionary Panel for Better Schools* both called for compensation for principals commensurate with their responsibilities. Since assistant principals in our county are compensated only slightly higher than veteran classroom teachers, we struggle to find capable and qualified candidates for these positions. We intend to take to our county council during this budgetary cycle an immediate 10% increase across the board for all principals and assistant principals. This would be a one time increase, recognizing that we must do something dramatic to help turn around the leadership drain. We will also propose a new salary scale for principals that includes a starting salary of not less than the amount that a 12-month teacher would earn plus an additional 10%. We will also make certain after the one time raise and the scale adjustment that both principals and assistant principals receive no less than the annual raise which teachers in our school system receive.

Salary Increases

A final part of the incentive package also comes from the *Maryland Task Force on the Principalship.* The Task Force recommended that each local jurisdiction review the benefits package for administrators, and we are committed to doing so. It also recommended that consideration be given to finding ways to improve the retirement package for principals. We intend to seek the support from our

Retirement and Other Benefits

county legislative delegation for improvements in the retirement plan for principals. We will attempt to get recognition of their 12-month status. At the current time, principals receive one year towards their retirement income for twelve months of work. Ten-month employees, on the other hand, receive the same credit towards retirement for ten months of work. We hope to make legislators aware of this discrepancy and create a sense of urgency for some kind of weighting of credit for principals that would encourage them to stay in the principalship longer.

Recognition

The ESS is convinced that we need to do a better job of recognizing and celebrating the accomplishments of our principals and assistant principals. We believe that such recognition helps to create an atmosphere where principals are respected and rewarded. We have established a countywide task force to address this issue. It is being chaired by a principal, and the recommendations will be submitted to the superintendent in July. Once approved by our local board of education, we will include any funding requirements to implement this plan in our budget request for next fiscal year.

Recognition and Celebration

Communication

This succession planning document has communication woven throughout its pages because it is such an important part of the transparency we are trying to build into our new model. We fully intend to include in those communication efforts all of our initiatives to retain our potential and aspiring leaders as well as our assistant principals and principals. We want them to know how valuable they are to us. The future of our school system and our children is in the balance. We cannot and will not allow ourselves to fail.

Leadership Culture Survey

Directions: This survey is intended to measure the degree to which principals in ESS feel that senior leadership has created a culture that is positive, ethical, supportive, and proactive. You are not to sign your name, and your response is to be forwarded in an unmarked envelope to the Office of Staff Development, 24 Main Street, Anywhere, Maryland, 21042.

Rank each item below as follows:

> 1 = never; 2 = rarely; 3 = occasionally; 4 = frequently; 5 = almost always

Please also provide a written response to comments section if you have advice for senior leadership on how to improve.

	Ranking
1. The culture in our school system towards principals is positive.	
Please briefly explain your ranking:	
2. The culture in our school system towards principals is ethical.	
Please briefly explain your ranking:	
3. The culture in our school system towards principals is supportive.	
Please briefly explain your ranking:	
4. The culture in our school system towards principals is proactive.	
Please briefly explain your ranking:	

Self-Assessment for School Leadership Candidates

Participant's Name: _____

Respond to each statement by assigning a rating of 1-5 that best describes your behavior. Distribute copies of the Observer Assessment for Instructional Leaders (Attachment C) to as many colleagues as you want in order to get their perceptions of your behavior.

1 = never; 2 = rarely; 3 = occasionally; 4 = frequently; 5 = almost always; NA = not applicable

Facilitate the Development of a School Vision

1.	I understand and participate in the process for developing the school vision.	
2.	I am able to articulate the vision and encourage others to articulate it on a regular basis.	
3.	I understand the process for the regular review of the school vision, and I encourage a variety of stakeholders to be involved in that review.	
4.	I can identify the resources that allow the vision to be implemented.	

Align All Aspects of a School Culture to Student and Adult Learning

5.	I exhibit mutual respect and teamwork and engender trust in dealings with students, staff, and parents.	
6.	I have high expectations for all students and teachers.	
7.	I participate effectively on the school Leadership Team.	
8.	I participate effectively in a professional learning community aligned with the school improvement plan.	
9.	I take advantage of opportunities for collaborative decision-making and distributed leadership.	

Monitor the Alignment of Curriculum, Instruction, and Assessment

10.	I engage in ongoing conversations with colleagues as to how state content standards, the voluntary state curriculum and/or local curriculum, and research-based instructional strategies are integrated into daily classroom instruction.	
11.	I ensure that assignments are rigorous, purposeful, and engaging.	
12.	I ensure that work is appropriately challenging and demonstrates new learning.	
13.	I ensure that assessments regularly measure student mastery of the content standards.	

Improve Instructional Practices through the Purposeful Observation and Evaluation of Teachers

14.	I understand what students are reading, writing, producing, and learning.	
15.	I use student data collected during the observation process to improve classroom instruction.	
16.	I use formal feedback from observation conferences, as well as informal visits, meetings, and conversations with colleagues to improve classroom instruction.	
17.	I participate in regular evaluation of my own performance based on continuous student performance.	
18.	I participate in the identification and development of potential school leaders.	

Ensure the Regular Integration of Appropriate Assessments into Daily Classroom Instruction

19. I ensure that multiple and varied assessments are collaboratively developed.	
20. I ensure regular use of formative assessments to adjust instruction.	
21. I ensure that summative assessments are aligned in format and content with state assessments.	
22. I ensure that interventions for individual students are appropriate and based on results of assessments.	

Use Technology and Multiple Sources of Data to Improve Classroom Instruction

23. I ensure appropriate use of instructional technology.	
24. I ensure the use of the MSDE website for school improvement purposes.	
25. I review and encourage others to review disaggregated data by subgroups to improve instruction.	
26. I engage in and encourage others to engage in root cause analysis of student performance to drive instructional decisions.	
27. I collaborate regularly with colleagues to analyze student work.	

Provide Staff with Focused, Sustained, Research-based Professional Development

28. I engage in results-oriented professional development that is aligned with curricular, instructional, and assessment needs connected to school improvement goals.	
29. I take advantage of collaborative planning, critical reflection, and job-embedded professional development during the regular school day.	
30. I take advantage of opportunities to participate in differentiated professional development based on career stages, needs, and student performance.	
31. I am personally involved in professional development activities in which I expect others to be involved.	
32. I understand how professional development in which I am engaged is aligned with the Maryland Teacher Professional Development Standards.	

Engage All Stakeholders in a Shared Responsibility for Student and School Success

33. I welcome parents and caregivers to the school, seek their participation, and provide information and materials to help their children learn.	
34. I encourage parents and caregivers to be active members of the school improvement process.	
35. I encourage community stakeholders and school partners to participate in school life.	

Observer Assessment for School Leadership Candidates

Participant's Name: _____

Respond to each statement by assigning a rating of 1-5 that best describes the behavior of the person who provided you this form.

1 = never; 2 = rarely; 3 = occasionally; 4 = frequently; 5 = almost always; NA = not applicable

Facilitate the Development of a School Vision

1. This person understands and participates in the process for developing the school vision.	
2. This person is able to articulate the vision and encourages others to articulate it on a regular basis.	
3. This person understands the process for the regular review of the school vision, and encourages a variety of stakeholders to be involved in that review.	
4. This person can identify the resources that allow the vision to be implemented.	

Align All Aspects of a School Culture to Student and Adult Learning

5. This person exhibits mutual respect and teamwork and engenders trust in dealings with students, staff, and parents.	
6. This person has high expectations for all students and teachers.	
7. This person participates effectively on the school Leadership Team.	
8. This person participates effectively in a professional learning community aligned with the school improvement plan.	
9. This person takes advantage of opportunities for collaborative decision-making and distributed leadership.	

Monitor the Alignment of Curriculum, Instruction, and Assessment

10. This person engages in ongoing conversations with colleagues as to how state content standards, the voluntary state curriculum and/or local curriculum, and research-based instructional strategies are integrated into daily classroom instruction.	
11. This person ensures that student assignments are rigorous, purposeful, and engaging.	
12. This person ensures that student work is appropriately challenging and demonstrates new learning.	
13. This person ensures that assessments regularly measure student mastery of the content standards.	

Improve Instructional Practices through the Purposeful Observation and Evaluation of Teachers

14. This person understands what students are reading, writing, producing, and learning.	
15. This person uses student data collected during the observation process to improve classroom instruction.	
16. This person uses formal feedback from observation conferences, as well as informal visits, meetings, and conversations with colleagues to improve classroom instruction.	
17. This person participates in regular evaluation of his/her own performance based on continuous student performance.	
18. This person participates in the identification and development of potential school leaders.	

Ensure the Regular Integration of Appropriate Assessments into Daily Classroom Instruction

19.	This person ensures that multiple and varied assessments are collaboratively developed.
20.	This person ensures the regular use of formative assessments to adjust instruction.
21.	This person ensures that summative assessments are aligned in format and content with state assessments.
22.	This person ensures that interventions for individual students are appropriate and based on results of assessments.

Use Technology and Multiple Sources of Data to Improve Classroom Instruction

23.	This person ensures the use of appropriate instructional technology
24.	This person ensures the use of the MSDE website for school improvement purposes.
25.	This person reviews and encourages others to review disaggregated data by subgroups to improve instruction.
26.	This person engages in and encourages others to engage in root cause analysis of student performance to drive instructional decisions.
27.	This person collaborates regularly with colleagues to analyze student work.

Provide Staff with Focused, Sustained, Research-based Professional Development

28.	This person engages in results-oriented professional development that is aligned with curricular, instructional, and assessment needs connected to school improvement goals.
29.	This person takes advantage of collaborative planning, critical reflection, and job-embedded professional development during the regular school day.
30.	This person takes advantage of differentiated professional development based on career stages, needs, and student performance.
31.	This person is personally involved in professional development activities in which he/she expects others to be involved.
32.	This person understands how professional development in which he/she is engaged is aligned with the Maryland Teacher Professional Development Standards.

Engage All Stakeholders in a Shared Responsibility for Student and School Success

33.	This person welcomes parents and caregivers to the school, seeks their participation, and provides information and materials to help their children learn.
34.	This person encourages parents and caregivers to be active members of the school improvement process.
35.	This person encourages community stakeholders and school partners to participate in school life.

Collaborative Assessment of Management Development Needs

Participant's Name: _____

	Training Requested
1. Budget and Finance	
2. Building a Master Schedule	
3. Change Process	
4. Ethics	
5. Facilitative Leadership	
6. Group Dynamics	
7. Interview Process	
8. Legal Issues	
9. Oral and Written Communication	
10. School Operations/Facilities	
11. Stress Management	
12. Student Services (Guidance, Health and Safety, Transportation, Food Service, Special Education Compliance)	
13. Team Building	
14. Time Management	
15. Building Positive Relationships with Parents and the Community	
16. Creating a Safe and Orderly Environment	
17. Management of Student Data	
18. Student Services	
19. Other	

Attachment E

Leadership Development Data Tracking System
Individual Data Tracking Form

Name: _____

A. Participated in instructional leadership professional development experiences that focus on instructional leadership content and skills

	Date	Method of Completion
1. Vision		
2. School Culture		
3. Alignment of Curriculum, Instruction, and Assessment		
4. Purposeful Observation of Instruction		
5. Integration of Assessments		
6. Technology and Multiple Sources of Data		
7. Providing Staff with Professional Development		
8. Engaging Community Stakeholders		

B. Participated in professional development experiences that focus on management/technical content and skills

	Completed	How
1. Budget and Finance		
2. Building a Master Schedule		
3. Change Process		
4. Ethics		
5. Facilitative Leadership		
6. Group Dynamics		
7. Interview Process		
8. Legal Issues		
9. Oral and Written Communication		
10. School Operations/Facilities		
11. Stress Management		
12. Student Services (Guidance, Health and Safety, Transportation, Food Service, Special Education Compliance)		
13. Team Building		
14. Time Management		
15. Building Positive Relationships with Parents and the Community		
16. Creating a Safe and Orderly Environment		
17. Management of Student Data		
18. Student Services		
19. Other		

C. Participated in and received feedback for the design of a leadership development experience:

Topic: _____

Design Team Date(s): _____

Team Leader: _____

D. Participated in and received feedback for the implementation of a leadership development experience:

Topic: _____

Implementation Team Date(s): _____

Team Leader: _____

Leadership Interest Form

Name: _____

I understand that I am being recommended for promotion to:

    Title: _____

    Location: _____

Choose One Option:

_____   I hereby notify all parties that I am interested in and wish to be considered for promotion to the above position.

_____   I hereby notify all parties that I am not interested in promotion to this position at this time.

Signature: _____

Date: _____

Current Assignment:

    Title: _____

    Location: _____

Acknowledgement of Transfer to New Position

Name: _____

I acknowledge that I have been recommended for transfer to a different position. I have had conversations with my immediate supervisor about this possible transfer, and I understand why it is being recommended. The new position is:

Title: _____

Location: _____

Choose One Option:

_____ I hereby notify all parties that I accept this transfer.

_____ I would like to be considered for alternative placements.

Signature: _____

Date: _____

Current Assignment:

Title: _____

Location: _____

Leadership Satisfaction/Needs Assessment Instrument

Please prioritize the items below by assigning each a number between1 and 7 (no duplicate numbers). Number 1 will be your top priority in terms of what would satisfy you as an employee and make you more likely to remain in a leadership position in our school system. Number 7 would be your lowest priority. We don't intend to suggest that even number 7 is unimportant, but we will need to prioritize our efforts. Please feel free to include any items in the "Other" category that you also think we should consider.

_____ Salary

_____ Retirement Benefits

_____ Health Benefits

_____ Leadership Development Opportunities

_____ Clearly Articulated Career Ladders

_____ Recognition for Accomplishments

_____ Additional Incentives for Challenging Assignments

Other:

_____

_____

_____

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