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**Title of Article:** Leadership Succession and Retention: It's time to get serious about a principal retention policy
**Title of Journal:** Leading & Managing
**Edition (Year):Page** Vol. 19, No. 2 (2013), pp. 1-14

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Leading & Managing, Vol. 19, No. 2, 2013, pp. 1-14

# Leadership Succession and Retention: It's time to get serious about a principal retention policy

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*ABSTRACT: The large number of principal retirements is presenting educational jurisdictions with two significant school leadership challenges: (1) a potential shortage of principals; and (2) a potential loss of corporate knowledge. These issues are especially relevant at a time when educational systems across the nation are engaged in significant restructuring based on greater devolution of responsibility and decision-making to the principal. The questions which arise are:*

1. *Are educational jurisdictions interested in retaining these principals past their normal retirement age?*
2. *Are late-career principals interested in staying-on beyond their anticipated retirement age?*

*This article suggests that it may now be more important than ever for educational jurisdictions to actively develop human resource policies deliberately aimed at capturing the experience and expertise before these principals 'walk out the door'. However such policies might not please everyone; especially those younger aspiring leaders who have been patiently waiting their turn.*

## The Current Context

### High principal retirements

Education systems across the nation (Barty et al., 2005; Lacey & Gronn, 2006) and internationally (Fink, 2010; Pont, Nusche & Hopkins, 2008) are experiencing high levels of principal retirements. These retirements are a microcosm of the generic baby boomer retirement bulge which is threatening to produce a loss of corporate knowledge across the society (Hesketh & Griffin, 2010). In 2007 a national survey, *The Staff in Australia's Schools* (SiAS, 2007) was commissioned by the Commonwealth Department of Education, Science and Training to help fill data gaps for future school leadership planning (McKenzie, 2008). The findings drew attention to the fact that more than 50% of school leaders were aged 50 years and older (Table 1). From this finding it was confirmed that 'a large number (of principals) will need to be replaced in the next few years as they retire' (McKenzie, 2008, p. 14).

A more recent Australian survey (Australian Bureau of Statistics, 2009) found that the 'education and training' sector registered the largest proportion of workers who intended to retire within the next 10 years. With principals being the oldest cohort in the teaching service (Barty et al., 2005; Lacey & Gronn 2005), the intention-to-retire figure is particularly relevant for school leadership succession planning. These findings drew attention to the fact that the education sector, above all other sectors, needed to be pro-actively addressing this issue.

**TABLE 1: AGE PROFILE OF AUSTRALIAN TEACHERS AND LEADERS (2008)**

| | Primary | Primary | Secondary | Secondary |
|---|---|---|---|---|
| Age band (years) | Teachers % | Leaders % | Teachers % | Leaders % |
| 21-30 | 18 | 2 | 16 | 1 |
| 31-40 | 21 | 13 | 21 | 9 |
| 41-50 | 29 | 33 | 30 | 35 |
| 51-55 | 19 | 29 | 19 | 31 |
| 56+ | 12 | 25 | 15 | 24 |
| Average age | 43 years | 50 years | 44 years | 50 years |

Source: Australian Government Department of Education, Science and Training (2007)

Scott (2003) reported that by 2013, 74% of current secondary principals and 59% of current primary principals will have retired. In addition over 50% of the deputy-principals, (the logical replacements for these principals), also indicated that they would be retired by 2013. This particular finding highlighted a generic problem for many jurisdictions: the entire leadership team in many schools (i.e. principals and deputy-principals) belong to the same generational cohort (i.e. baby boomers) and are due to retire at a similar time.

## A shortage of principals (and a lack of aspirants)

The high number of retirements is producing a shortage of principals. Internationally Hargreaves, Halasz and Pont (2008) confirm that 'in many countries, almost half of the current generation of school leaders is due to retire within the next five years, creating significant challenges to leadership recruitment, stability and effective continuity ...' (p. 71). Local research confirms a potential shortage of principals in Australia (d'Arbon, Duignan & Duncan, 2002; Lacey & Gronn, 2006; McKenzie, 2008).

However one must be cautious as the issue of principal shortage is complex and contextual. Lacey and Gronn (2007) draw attention to a geographic dimension where 'highly fancied appointment locations may co-exist alongside hard-to-staff areas' (p. 3). Consequently whilst there may be a struggle to fill principal vacancies in some of the rural and remote areas, there may be an over-supply of candidates for popular metropolitan and coastal areas. This dichotomy can provide a skewed impression of a generic shortage.

Exacerbating the potential shortage of principals is the reluctance of younger and middle management teachers to aspire to leadership positions. In the UK, Fink (2010) found that, 'rather than a supply problem ..., the real dilemma seems to be the unwillingness of deputy heads, middle leaders and teacher leaders to aspire and to seek headship' (p. 30). The *Staff in Australian Schools* report (McKenzie, 2008) noted that nationally 'only 10% of teachers intend to apply for either a

Deputy Principal or Principal position within the next three years' (p. 13) and that 'only about 50% of principals believe that school leadership positions were attractive to qualified applicants' (p. 12). These findings supported earlier research (d'Arbon, Duignan & Duncan 2002; Lacey & Gronn, 2006) which indicated that middle management was not interested in applying for the principalship. Mulford (2008) concluded that, 'finding the next generation to succeed those soon to retire is proving a challenge, not only because of the demographics, but because there are some who do not like the look of the leadership pressures' (p. 5).

Principal shortages seem to be a combination of various factors. In addition to the obvious baby boomer retirement bulge there is the attrition from the profession of younger teachers who would be potential principals; the reluctance of classroom teachers to seek any promotion; the reluctance of middle managers to aspire to, or apply for, the next step: the principalship; and the premature retirements of experienced principals.

## The quality of aspirants

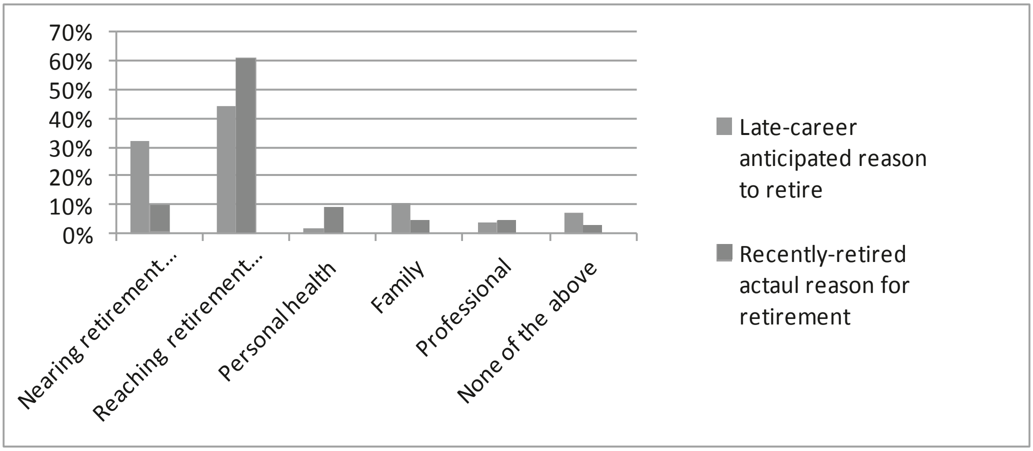
A potential shortage of principals inevitably turns the attention of educational jurisdictions to the effectiveness of succession planning strategies. When there is an abundance of applicants, systems can indulge themselves by choosing the best from the available bunch. When there is a shortage of applicants simply selecting the 'best of the bunch' may well not produce quality leadership (Fink, 2010). It is easy for school systems to find warm bodies to fill leadership positions but as Fink (2010) warns, 'the challenge of course is to find and assign the right warm body to the right place at the right time for the right reasons' (p. xxi). Mulford (2008) also noted that succession planning is not simply a *quantitative* issue as 'it is vital that education systems ensure that there is a supply and flow of high-quality candidates for school leadership positions' (p. 56). Barty et al. (2005) found no real shortage of *qualified* candidates in Australia but raised the question: Do qualified candidates necessarily equate to *quality* candidates? It would seem that education systems' assessments or reviews about their leadership succession strategies have primarily focused and reported on the *quantum* (the number of warm bodies) rather than the *quality* of those bodies.

At a time of significant change in schools (i.e. devolution and local decision-making autonomy) high-quality and highly-experienced leadership is of the greatest importance. If such quality leadership is not forthcoming from aspirants (e.g. because of lack of interest in promotion) then retention of late-career principals (beyond their anticipated retirement age) might well provide a logical and effective solution.

## Superannuation drives retirement

Retirement for principals has historically been seen to occur at the age when superannuation funds (or retirement funds) mature and are accessible. Recent research with NSW public school principals (Marks, 2012) has demonstrated that retirement is in fact 'superannuation-driven'. In this research both late-career and recently-retired principals clearly indicated that nearing or reaching the superannuation retirement age was the overwhelming motivator/reason to retire.

**FIGURE 1: REASONS TO RETIRE**




## Government concerns

Internationally the large numbers of baby boomers who are due to retire upon reaching superannuation/retirement fund/pension age (e.g. 55 years old – 65 years old) is a major concern to governments. The increasing proportion of the population which will be 'retired' is placing a continuing and growing financial pressures on government budgets. Like other nations, Australia's concern is the spiralling health and social welfare costs as the number of 'dependent' retirees increase faster than the number of tax-paying workers.

The previous Australian Federal Government's Second Intergenerational Report (Swan, 2010) acknowledged that although retirees make a valuable contribution to the economy and living standards through non-working activities (such as volunteering or carer activities), governments were now keen for those older Australians to continue to stay in the workforce for longer. This is now encouraged through the introduction of incentives in 'the tax-transfer system ... workplace flexibility; and access to retraining' (Swan, 2010 p. xiv). Such policy statements indicate that governments intend to intervene to encourage older workers to continue in the workforce. For older workers to stay-on beyond the traditional retirement age is a key objective of the federal government.

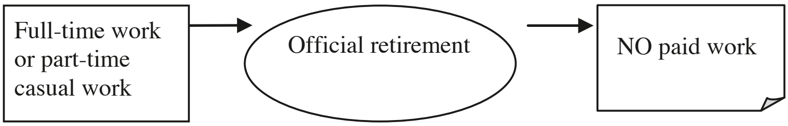
When specifically investigating the education sector in New South Wales, the Auditor-General released a report, *Ageing Workforce-Teachers* (NSW Auditor-General's Department, 2008) which highlighted the problem of older experienced workers leaving the workforce. This report drew upon two earlier reports: one which had recommended that government agencies 'find ways to allow mature age employees to phase their retirement to progressively take on less responsibility, work shorter hours and have access to other more flexible working arrangements' (NSW Premier's Department, 2006a, p. 12); and another which had found that 72% of those intending to retire in the next five years would delay their retirement if they could reduce their hours without reducing their superannuation (NSW Premier's Department, 2006b, p. 15). In providing advice to the NSW Department of Education and Community (NSWDEC) the Auditor-General suggested that ways needed to be found to allow mature age employees to phase their retirement; to progressively take on less responsibility; to work shorter hours; to have access to more flexible working arrangements; and to access more flexible superannuation regulations. The message from federal government and inter-government reports is consistent: ways need to be found to encourage older workers to stay connected to the workforce for longer.

## Public sector employee retirement intentions

Baby boomer employees do not appear resistant to this concept of working longer (Denmark et al., 2007; Mackay, 2007). In fact staying connected to the workforce longer may now be the preferred option. Hesketh and Griffin (2010), in a recent Retirement Planning Survey for NSW public sector employees (of which public school teachers represented the largest cohort), respondents were asked which of the following three models of retirement transition (A, B or C) they would prefer to follow (Figure 2).

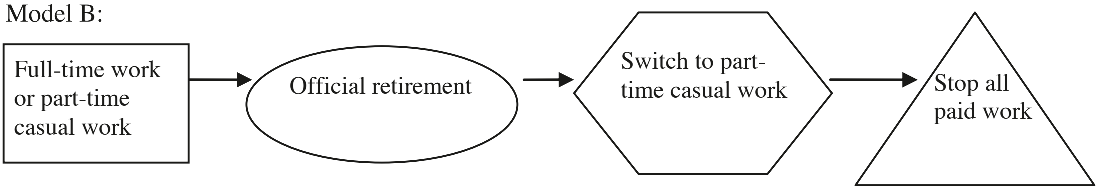
**FIGURE 2: PREFERRED RETIREMENT MODELS FOR NSW PUBLIC SECTOR EMPLOYEES**

Model A**:**



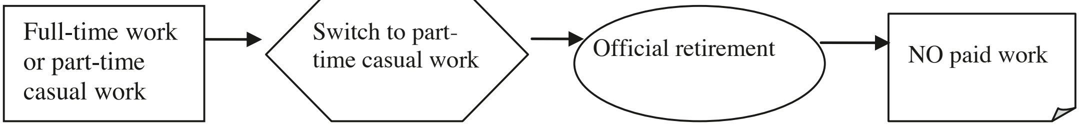

This traditional retirement model received 29.5% supports.

Model B:




This non-traditional model received 41.0% supports.

Model C:




This non-traditional model received 29.5% supports.

When combined the support level for the two non-traditional (staying connected to the workforce for longer) models (B and C) was indeed 70.5%. Clearly the majority of public sector employees in NSW (including teachers) are looking for a model which is not based upon the traditional model of moving from full-time work to full-time retirement but rather for some form of *retention* in the workforce beyond the traditional retirement age.

## Is it Time for a Principal Retention Policy?

To ensure strong, expert and knowledgeable leadership in schools at a time of high principal retirement, low aspirant interest and sweeping reform is obviously a matter of high importance to educational jurisdictions. Therefore is the time right for educational jurisdictions to look seriously at ways to expand available leadership capacity? There would seem to be two strategies which can be used to extend leadership workforce capacity: (1) *attracting* new people to the role; and (2) *retaining* existing people in the role. So far *attraction* to the role (i.e. succession planning programs for aspirants) has been the *favoured child* and has dominated the debate. Unfortunately such succession programs would seem to have operated with limited success in attracting or preparing aspirants to leadership (Dempster, 2007; Gronn, 2007). Commenting on this failure of succession planning strategies to attract and deliver the required outcomes, Lacey and Gronn (2005) highlighted the ignored perspective of *retention*: ‘retention is as much an issue in the succession planning mosaic as is attraction’ (p. 44).

However *retention* has been very much the *neglected child* as educational jurisdictions have rushed to cope with the high principal retirements through attraction policies. A specific Retention Policy would require educational jurisdictions to possess a positive mind-set: (1) which genuinely values and recognises the skills, expertise, corporate wisdom and accumulated knowledge of late-career principals; (2) which develops a systemic and transparent mechanism for capturing this capacity before it ‘walks out the door’; and (3) which implements flexible work options to allow principals to stay-on or to re-engage following retirement (in full or part-time roles). Not only would such a retention policy assist educational jurisdictions to alleviate potential school leadership shortages, but it would also align with federal government policy initiatives to retain older workers.

## A Principal Retention Policy

Whether or not a Retention Policy can work will primarily depend on the answers to the following two questions:

1. Are late-career/retiring principals interested in working longer (full-time or part-time)?
2. Are educational jurisdictions interested in retaining the services of late-career/retiring principals?

To shed light on these vital questions this article critiques and elaborates on the findings from recent research undertaken with 100 late-career and 108 recently-retired principals in NSW (Marks, 2012).

**TABLE 2: CHARACTERISTICS OF RESEARCH SAMPLE GROUPS**

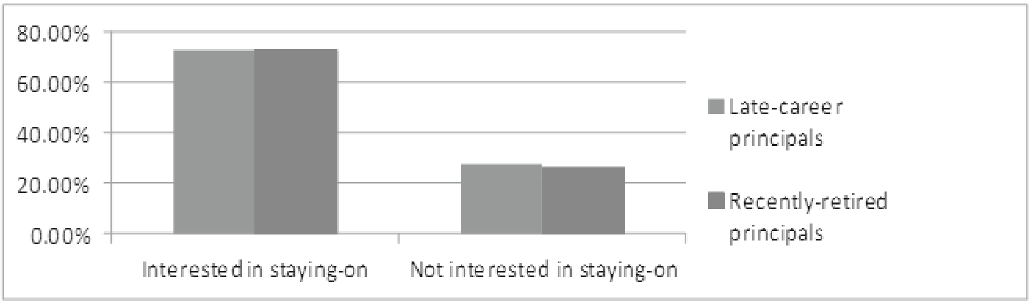
| | NSWDET* total principal cohort | Research late-career principal cohort | Research recently-retired principal cohort |
|---|---|---|---|
| Males | 54.0% | 61.0% | 56.5% |
| Females | 46.0% | 39.0% | 43.5% |
| Primary | 79.0% | 72.4% | 75.0% |
| Secondary | 21.0% | 27.6% | 25.0% |
| Rural | 53.2% | 55.0% | 54.6% |
| Metropolitan | 46.8% | 45.0% | 45.4% |

* New South Wales Department of Education & Training – now NSWDEC

## Question 1: Are principals interested in working past their retirement age?

*Are principals interested in staying-on?*
As indicated in Figure 3, the concept of staying-on (full-time or part-time) beyond the superannuation retirement age was strongly supported by both late-career and recently-retired principals.

**FIGURE 3: PRINCIPALS INTEREST IN STAYING-ON PAST RETIREMENT AGE**

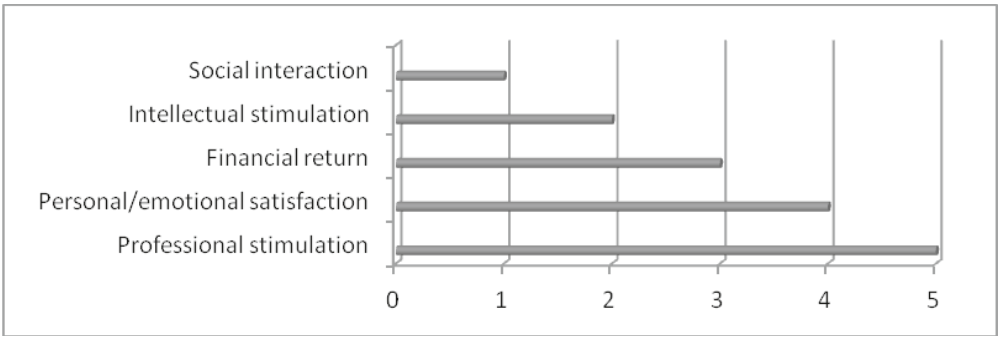



These findings (Marks, 2012) are consistent with both the generic national picture (Denmark et al., 2007) and the NSW public sector picture (Hesketh & Griffin, 2010) where the clear indication is that baby boomers have a strong desire to stay connected to the workforce for longer and not to retire at a pre-determined superannuation age.

From within the late-career cohort, this study randomly (and unintentionally) identified 13 late-career principals who had already taken the decision to stay-on full-time beyond their superannuation age. The vast majority of their colleagues had retired because their superannuation entitlement had matured. This group could also have taken full-time retirement and accessed a quite generous income stream but had opted to stay-on in full-time principalship. To explore why this had happened the staying-on cohort was invited to participate in the triangulation phase of the research involving an on-line questionnaire and follow-up individual phone interviews. The findings are described below.

*What motivated these principals to stay-on full-time?*
Respondents were presented with five (5) choices to arrange in rank order for their decision to stay-on: financial return; social interaction; maintaining a sense of purpose and identity; professional stimulation; and intellectual stimulation. The resultant motivators in rank order from most popular (Professional stimulation) to least popular (Social interaction) are shown in Figure 4.

**FIGURE 4: REASONS FOR CHOOSING TO STAY-ON FULL-TIME**




Staying-on principals were keen to elaborate on their reasons for taking this a-typical choice:

> My first choice was that I made my decision for the professional stimulation I needed. The others options were not that important to me. (Primary male)

> I have an excellent relationship with my partner (who is retired) but do not want to spend all the time together. Expectation of our children is to mind the grandchildren. Continuation of work is a great solution. (Secondary female)

> Since completing my BA majoring in politics I have mostly been involved with Low SES communities and in particular indigenous communities. I saw coming to (this school) as a real opportunity to put some of my personal passion to make things work to the test. I have not been disappointed. My real concern is where to go next! (Primary male)

*Were these principals pleased with their decision to stay-on?*
Respondents were given three (3) choices: extremely pleased, quite pleased and regretful with 100% indicating that they were *extremely pleased* with their decision to stay-on. These principals elaborated on the positive outcome of their decision with comments such as:

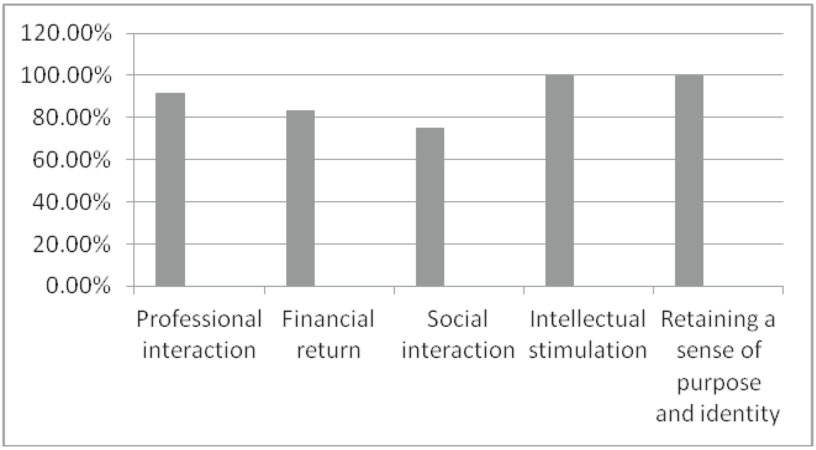
> It was simply the best thing that I could have done ... I am now finishing my career on an absolute high. I hadn't realised the psychological impact of being able to work by choice. (Secondary male)

> It has been one of the best decisions I have made in my life. (Primary male)

> My staying-on experience ... has been enormously satisfying, and definitely the right thing for me to do ... I am acutely aware of my physical state, and aware that it may limit me in the future. At this point, however, I have no regrets. For me, staying on was right. (Secondary female)

*What were the personal benefits of staying-on?*
This cohort was subsequently asked to reflect on their experience and to indicate the personal benefits of staying-on against each of the original criteria (i.e. professional interaction; financial return; social interaction; intellectual stimulation; and retaining a sense of purpose and identity): 100% reported intellectual stimulation to be a benefit; 100% found retaining a sense of purpose and identity to be a benefit; 91.7% reported professional interaction as a benefit; 83.3% found financial return as a benefit; and 75% indicated social interaction to be a benefit (Figure 5).

**FIGURE 5: PRINCIPALS REPORT THE BENEFITS OF STAYING-ON**




Although a small group (N=13), it was interesting that the principals who had taken this personal action to stay-on (without any system encouragement or incentives) were displaying a very positive attitude to that decision.

*Are principals interested in refocusing?*
*Refocusing* is the process of retiring and then re-engaging with the workforce. Late-career principals in the research (N=100) indicated a very strong (almost unanimous) interest in refocusing (Table 3). The interest in refocusing was even more dramatic as 92.6% of the recently-retired principals (N=108) had in fact already refocused back into the workforce. Interestingly the vast majority of this refocusing work (for the recently-retired cohort) was taking place within the educational community (91.6%). Whatever the motivation (e.g. generational, professional, intellectual, social, altruistic or financial), the vast majority of the retiring baby boomer principals in this study indicated an extremely high level of interest (late-career) or high level of action (recently-retired) in staying connected to the workforce as a deliberate and desirable *investment* in their *retirement portfolio* (Salt, 2007).

The 92.6% level of refocusing by the recently-retired cohort was a very significant finding. It was an almost equivalent figure to the *anticipated* response by those late-career principals still working full-time; it was much higher than *anticipated* by those recently-retired principals when they were in their late-career phase; and certainly much higher than the expectations of professional associations of principals groups who have seen these figures (e.g. NSW Primary

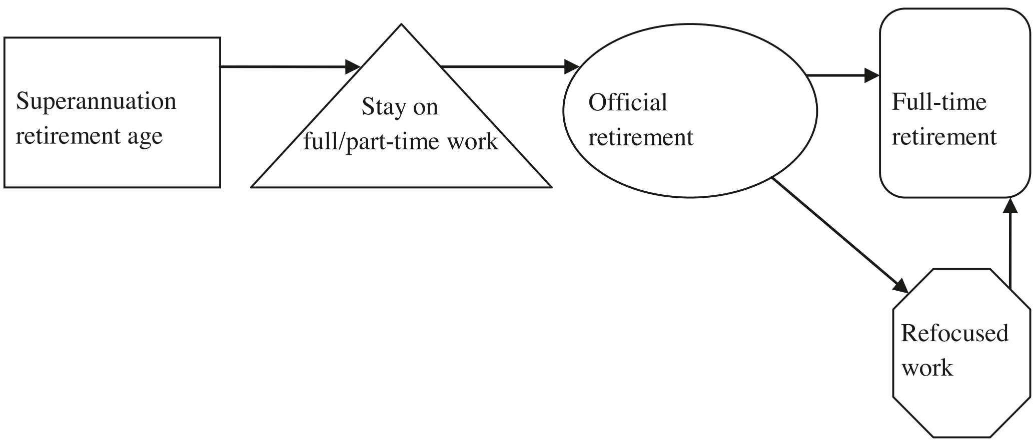
Principals Association and NSW Secondary Principals Council). Retiring principals are ‘marching with their feet’. It would appear that recently-retired principals may have made up their minds and have decided that they *will* remain connected to the workforce in some form. Therefore the real question is not whether or not these principals will stay connected to the workforce for longer, but which organisations will move to reap the benefits of this new willing expert workforce capacity?

**TABLE 3: LATE-CAREER PRINCIPALS’ INTEREST IN REFOCUSING**

| Principals interested in refocusing | Late-career |
|---|---|
| I would like to work in retirement | 93.6% |
| I do not wish to work in retirement | 6.4% |

*Are principals interested in the traditional or an alternative model (of retirement)?*
It would appear that the traditional retirement model (i.e. moving directly from full-time work to full-time retirement at superannuation age) has been replaced for baby boomers principals by an alternative model (i.e. staying connected to the workforce for longer by staying-on full-time/part-time or by refocusing). This shift to an alternate model (as represented in Figure 6), was presented to the research cohorts (i.e. 100 late-career principals; 108 recently-retired principals; and 106 peer-review principals) for validation. The alternative model attracted very strong support as both: (1) the desired model when reaching the traditional retirement age (72.9%); and (2) as the one which most accurately represented the aspirations of fellow principals (83.3%).

**FIGURE 6: THE NEW MODEL FOR TRANSITION TO RETIREMENT**




This finding from baby boomer school principals in NSW (Marks, 2012) aligns with the broader community findings of McCrindle (2009), Salt (2007), Denmark et al., 2007 and Mackay (2007) in Australia; and Cooper (2008), Winston and Barnes (2007) and Johnson (2001) in North

America who all concluded that the traditional model of retirement is no longer the preferred model.

## Question 2: Are educational jurisdictions interested in developing and implementing principal retention policies?

A recent (January, 2013) world-wide electronic search (by the author) for principal retention policies produced only policies relating to *retaining* principals *during* the main phase of their career so as to avoid premature resignation or retirements.

*Premature* is traditionally the descriptor assigned to principals who opt to retire well before reaching their superannuation/retirement fund exit date. The high costs to educational jurisdictions associated with premature retirements/resignations (Ribbins & Zhang, 2004) could explain why many educational jurisdictions have retention policies aimed solely at keeping practising principals away from premature retirement.

However no evidence was found of system policies aimed at retaining principals beyond their normal/anticipated retirement age. In addition interviews with leaders of the NSW Public (Regional Directors), NSW Catholic (Diocesan Directors) and NSW Anglican (Executive Director) education systems produced a similar result: no one seems to have developed a specific policy to retain late-career principals (Marks, 2012). Educational jurisdictions, both nationally and internationally, do not seem to have an interest in (or see the need for) developing a deliberate principal retention policy. Whether this is accurate workforce planning or a misreading of the leadership capacity supply-line, only time will tell.

For educational jurisdictions who might decide that their forward workforce planning will involve an exploration of the principal retention concept, participants in the research made a series of recommendations which may well be worthy of deeper consideration (Marks, 2012).

*Pre-exit interviews*

Principals suggested that to successfully develop and implement a principal retention policy there needed to be a mechanism to directly collect and collate vital data from late-career principals. One strategy recommended was a pre-exit interview. It was recommended that this mechanism could be offered 2-3 years before the anticipated age retirement point and would be a dialogue between the principal and the relevant senior officer. The pre-exit interview process would initially establish if the principal was interested in staying-on (either full-time or part-time) or not. In this way strategic human resource planning could take place which would factor in for each school *for how long (if at all)* the principal intended to stay-on; when the position was likely to become a vacancy; and if this late-career principal was interested in being part of the on-going leadership workforce capacity. Consequently succession planning strategies could be more effectively targeted at short-fall areas (e.g. geographic locations; primary/secondary settings; gender specific schools; indigenous schools; schools with specific specialisations) which would facilitate a more focused use of human and financial resources.

Principals in the research also suggested that the exit interview process would be an effective public relations exercise where the organisation could systematically ensure that the contribution which the principal had made would be valued and recognised in a public and personal manner.

*Expression of Interest (EOI)*
It was further recommended by principals in the research project that during the exit interview if the principal indicated an interest in retiring but then refocusing back into the workforce with the same employer, then an EOI could be used to collect information about the principal's qualifications; areas of expertise; areas of demonstrated experience; time availability for work; geographical availability for work; willingness to participate in future training and development; plus all post full-time employment contact numbers, addresses and email addresses. This information could then be stored on a central data-base to be available to educational jurisdictions when seeking the services of the most suitable person for each prospective role (be that full-time, part-time or contractual).

## Conclusion

International organisational psychologists Beehr and Bennett (2007) warn that 'as the baby-boomer population ages, the number of retirees and the proportion of the society they represent will almost certainly increase to levels never before seen' (p. 277). A recent Sydney Morning Herald article (Wade, 2012) noted that 'as the greying population reshapes the profile of Sydney's labour force ... the number of employees staying in the workforce beyond the official retirement age ... has surged by 88% over the decade'. Thus it is now more important than ever to understand the changing face of retirement. For educational jurisdictions late-career/soon-to-retire principals would seem to represent an expert workforce capacity willing to be 'captured'.

## Generational Collide or Generational Transfer

McCrindle (2010) notes that 'as baby boomers are working longer than previous generations and are more likely to stay in positions of power longer than anticipated, ... Gen X-ers grow frustrated with stunted advancement up the corporate ladder' (pp. 30-31). This phenomenon is referred to as a 'generational collide' (Edge, 2012; Engelmeier, 2012; Fogg, 2008; Lancaster & Stillman, 2002). However if managed adroitly through a combination of both principal retention and principal succession policies, a 'generational collide' may be avoided and replaced with a 'generational transfer': retain the old and bring forth the new.

## Recommendation

The recent research study (Marks, 2012) which provided the basis for this article indicated that like their sisters and brothers in other sectors of the workforce, late-career principals intend to stay connected to the workforce for longer. Therefore the time may well be right for principal retention policies. In this way the mosaic could be completed: the *favoured child* (succession programs of the last decade) would be joined by the *neglected child* (retention policies for the current decade) to complete the family circle. It is recommended that this two-pronged approach could reap substantial human capital returns through deepening and extending the leadership workforce capacity of the organisation.

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