



## A SUCCESSION PLANNING MODEL FOR ACADEMIC HEADS

Oleh

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### *Abstract*

*This study identified the practices, issues and concerns, and key elements of a succession planning model for academic heads for the five private sectarian schools in the Philippines. It was conducted in school year 2018-2019, and participated by fifty-eight (58) religious administrators and lay academic heads and teachers. Using the key features of participatory method, workshops, focus group discussion, and interviews were conducted for data gathering. The results showed that the practices in the selection and appointment of academic heads were administration's preference, and criteria for selection and appointment of academic heads. From these practices, the issues and concerns that emerged were objectivity of decision, professional growth, spirituality and culture, and motivation. The elements of succession planning which are vision-mission, spirituality and culture, institutional policies, processes, and procedures, and professional growth were identified based on the practices, and issues and concerns. From these data, the succession planning model for academic heads was developed. The steps in the succession planning are understand the school organizational culture, build a shared vision, set and implement policies and leadership standards, provide personal and moral development programs, provide leadership development programs, and select and appoint academic heads. All policies and programs of the succession planning model must be anchored on the vision-mission of the schools. The faith and spiritual development programs (for private sectarian schools) or the personal and moral development programs (non-sectarian and public schools) are important in the preparation and appointment of future academic heads.*

**Keywords : Succession Planning, Leadership Training And Preparation, Mentoring, Spirituality And Culture**

## I. INTRODUCTION

A Catholic administrator shared in the annual meeting of chief administrators in the catholic “There can be no success to the mission, if there are no successors to the mission.” This was shared by Clark (2015) when a Catholic administrator expressed his/her idea on the issue on developing creative and effective ways to identify, encourage and train talented Catholic educators for leadership positions during the annual Chief Administrators in Catholic Education Conference in 2014. This issue on leadership succession is prevalent in Catholic education and public schools in the United States. In the Philippines, this is one of the key issues which came out in the 2016 Catholic Educational Association of the Philippines (CEAP) National Convention.

Succession planning, is a continuous and dynamic process that assists a business or organization in aligning its goals and its human capital needs. It can prepare organizations for future critical vacancies of middle and senior management positions. Leadership change is one of the most important challenges that every organization must face and prepare. If the organization is truly committed to its vision-mission and continuous development, leadership sustainability can be ensured by having a good succession plan, which will identify and prepare its future leaders (Butler & Roche-Tarry, 2002). To sustain leadership, companies with succession planning typically view it as a development process and not a replacement process. When key and critical openings occur, these companies are prepared to fill the positions with skilled and experienced candidates from within because they have planned for such a transition by ensuring that the individuals selected have been exposed to proper training and career development opportunities (Hoffman & Womack, 2011). In the research by about “Good to Great” companies, particularly on leaders who made an impact and brought about success in the company, one can easily adapt to a changing world by beginning with “who,” rather than “what” (Collins, 2001).

Despite the call to create a good succession plan, there are companies or organizations that refuse or fail to make a succession plan. Studies have shown that ninety-percent percent (90%) of companies understand the importance of succession planning, yet, less than half have a formal succession plan. While the importance of succession planning is intuitive to most senior executives, he cited that some companies believe succession planning will just happen. They think a successor will come to the fore at the appropriate time, so they don’t believe a systematic approach is really necessary (Schlechter, 2015).

In education, it seems that succession planning is not one of the major agenda of education leaders, for they think of the present and not of the future. In the study conducted by the Australian Institute for Teacher and School Leadership (2015), it confirms that there are a small number of preparation strategies and development opportunities across Australia’s education systems and sectors that have been put in place to see that aspiring principals are well-prepared for the challenging and changing school leadership role. Similarly, in the Hanover Research (2014), it revealed that school administrators are facing a changing educational environment, where traditional policies are no longer able to prepare them sufficiently. With shifting demographics and inadequate training programs, reactive hiring practices are leaving principals, superintendents and administrators ill-prepared for their roles.

In the Philippines, the Department of Education (DepEd) has clearly set the guidelines on the allocation and reclassification of school head positions, as stated in DepEd Order No. 97 s. 2011. It states that the Secretary of Education shall create a promotions board, at the appropriate levels. It shall formulate and implement a system of promotion for schools division supervisors, schools district supervisors and school heads. The basis for promotion of school heads shall be on educational qualification, merit and performance and not on the number of teachers/learning facilitators and learners in

the school. More specifically, the guidelines require all Principal I applicants to have passed the National Qualifying Examination for Principals (NQEP) and completed the Basic Training Course for School Heads as certified by the National Educators Academy of the Philippines (NEAP).

The Catholic Educational Association of the Philippines came up with the Philippine Catholic Schools Standards (PCSS) for Basic Education (2016), which include leadership and governance, as an important area for Catholic schools. Standard 5 in the PCSS states that “An excellent Catholic school is governed and administered by servant leaders, who are Christ’s witnesses, professionally qualified and recognized by competent Church authority.” Moreover, it also supports the importance of personal and professional qualifications. Standard 5.2 states that “School leaders possess the personal qualities and professional qualifications required by their positions.” Standard 6 in the PCSS states that “An excellent Catholic school is governed and administered, in accordance with relevant government policies within the framework of Gospel values and teachings of the Church.”

In a study conducted on educational leadership in the Philippines particularly on the principals’ perspectives on problems and possibilities for change, ten themes emerged namely curriculum, instruction, facilities, technology, politics, policy, finance, communication, religion and corruption. It also revealed that many teachers associate career advancement with connections making other qualified teachers powerless. Sadly, it concluded that politics rather than educational reason is the basis for many decisions in the Cagayan de Oro schools. Promotion to leadership positions is always viewed as political (Brooks and Sutherland, 2014).

In the private sectarian schools in the Philippines, a case study on the experiences of a principal from a religious congregation showed how the members of the religious congregation are appointed to school leadership positions. These private sectarian schools which are managed by religious

congregations appoint principals from their members. These principals who are members of the religious congregation are appointed for a three-year term in the schools run by the congregation. Most of these priests and religious sisters come from different academic backgrounds and without a solid background in school management. (De Guzman, Tan & Lagrimas, 2007).

This is also very evident in the five private sectarian schools. Despite the lack of training and preparation, including educational qualifications, faculty members have been appointed to key academic positions. Based on observations and initial information gathered, there are no formal training programs for future academic heads. There is a budget provision for faculty development, but the program is unclear. The school offers a scholarship program, but it is no longer as strong as before. Years ago, there were teachers who were sent for graduate studies through the scholarship program and some were able to earn the degrees and are currently academic heads. Today, very few have availed of the scholarship program and teachers who are currently taking graduate studies are shouldering personally the expenses for their professional growth. In terms of the academic qualifications of academic heads in the basic education department, particularly in the school where the researcher is currently employed, only 30% are master’s degree holders based on the information provided by the human resource office head. Some of those in the key positions like assistant principals still need to earn their master’s degree. As per data provided by the human resource compliance team of the religious congregation, the data are basically similar in the other four schools. Affecting also the leadership succession is the attrition rate which is relatively high in the last three years. It can be implied that there may be few future leaders who can be identified and the commitment of the new teachers to the institution may be doubtful.

If the religious congregation wants its mission of “Educating by Evangelizing and Evangelizing by Educating” to continue and

be relevant in these private sectarian schools, it is imperative that leadership be given more importance by coming up with a succession plan, that will strengthen the leadership sustainability of all schools. Considering the decrease in religious vocation, lay empowerment must be seriously considered and strengthened. This was emphasized by Hughes and Pickeral (2013) in discussing shared leadership. They said that shared leadership is about having the same purpose or goal. This also means having an engaging school climate. Each faculty member, with its own different opinions, must understand that the reward at the end of every school year is strong student learning in a positive school climate.

With the absence of succession planning in these private sectarian schools including unclear policies and procedures in preparing, selecting and appointing academic heads, it is important to develop a succession planning model for these private sectarian schools for leadership sustainability and success of the mission. The aim of this study is to identify the practices, issues and concerns, so with perceptions on leadership succession planning. Through the findings, the rationale and key areas can be determined, in developing a succession planning model. Likewise, it will be able to identify more objectively future school leaders and provide more systematic bases for selection and appointment, which will lead to the realization of the school's vision and success in the mission of these schools.

The following are the research questions for this study :

1. What are the practices in selected private sectarian schools in the selection and appointment of academic heads ?
2. What are the issues and concerns in the selection and appointment process of faculty members to academic head positions ?
3. Based on the findings, what succession planning model can be developed for the private sectarian schools?

## II. LITERATURE REVIEW

In organizations, change happens because it is necessary and the leader is expected to handle and deal with the challenges of change. Managers and the organizations they serve, be it private or public, service or production, continue to be evaluated on how it effectively and efficiently manage change (McCalman, Paton & Siebert, 2016).

Sadly, for today's manager, the ability to handle challenging change situations will be judged by ever-decreasing time scales. said that the rate of change will not slow down soon. Companies will continue to compete and it will speed up in the upcoming decades. Leaders must be ready for any change that will happen, for it can be very unpredictable (Kotter, 2012).

### **Successful Organizations: Level 5 Leadership and the Right People in the Bus**

If organizations want to be successful, particularly in realizing their vision-mission, it is important to find the right people who will be part of their journey towards greatness. In the book "Good to Great" which was based on the research conducted by Jim Collins and his team about United States companies based on the fifteen-year cumulative stock returns relative to the general stock market, they found out that Level 5 Leadership is the key factor in these "great" companies. Every good-to-great company had Level 5 leadership during the pivotal transition years. Level 5 leaders exemplify an ironical blend of personal humility and professional will, with an ambition, primarily about the company and not themselves. More importantly, they prepare successors for even greater success in the next generation. They are ambitious, to be sure, but ambitious first and foremost for the company, not themselves. They are leaders who set up their successors for even greater success in the next generation, whereas egocentric Level 4 leaders often set up their successors for failure. Level 5 leaders display a compelling modesty, are self-effacing and understated. In contrast, two thirds of the comparison companies had leaders with

gargantuan personal egos that contributed to the demise or continued mediocrity of the company. In a study about leadership succession it was found out that 84% of the “Best New York Companies” have or will have a succession plan in place in the next three years. Therefore, succession planning is important for the success of an organization.

The future and success of any organization depend on the people who work with commitment and dedication. More importantly, it is important that the future leaders of the organization are really the right persons. These are the people with character and strongly-driven by the mission and values of the organization. Succession planning will identify and train the right people and leaders in the organization.

### **Succession Planning: Is it for Real?**

It is inevitable for business and school organizations to have succession planning for the realization of its vision mission. Experts have come up with definitions of succession planning and the emphasis zeroes in on leadership sustainability. An American expert on human resource management said that succession planning is a systematic approach to ensuring leadership continuity within an organization by recruiting or encouraging individual employee growth and development. She pointed out that it is not simply about having people but having the right people at the place and at the right time. Moreover, she said that the benefits of creating a succession plan are providing a framework to align leadership with strategic needs of the organization and development for executive/management staff and on-going job analysis and opportunity for executive staff to adjust roles based on changing business conditions and strategic initiatives (Haroski, 2012).

Succession planning is a tool that manages knowledge and change, develops leadership capacity, builds smart teams and retains and deploys talent in a manner that helps an organization function to its full potential (Groves, 2003). In Catholic schools, succession planning is an organization-wide

strategy to prepare future leaders, by reflective engagement of qualified personnel in on-going mission-critical activities, in order to maintain a culture of continuous improvement (Nuzzi, 2015).

Based on these key points on succession planning, it can be drawn the advantages and benefits of having a succession plan. Succession planning ensures that the company has the skills, talent and expertise to achieve its strategic objectives over time. It can provide a significant competitive advantage for a longer period of time. An organization must invest the needed time to carry out a well-spelled out succession planning. However, though many business executives believe on the importance of succession planning, only a few have created their own succession plans. Similarly, succession planning must be done and implemented in schools as organization. Each school must have a succession plan for sustainability and continuity.

However, it seems that succession planning is ignored or taken for granted by most organizations. Despite the revelations of researches that traditional policies are not anymore helpful in preparing school administrators due to the changing educational environment that they face, there are schools that observe the obsolete policies for one reason or the other. Succession planning builds a list of qualified candidates for leadership positions instead of waiting for the vacancy to occur. Replacement plan must be rejected and make a development plan for leaders instead. Surprisingly, business and school organizations do not seem to be bothered strongly of the need of having a succession plan despite the advantages and benefits that it can provide for leadership sustainability. From this point of view, it seems that succession planning is unreal or one of the management theories completely ignored that will continue to be studied but never put into action. However, there are organizations that invest on succession planning and it is important to learn how they develop and implement succession planning.

### **Leadership Pipeline: Filled or Empty?**

Principalship is an educational position that can be considered attractive because of the prestige, authority and power that come with it. However, teachers are not strongly drawn and attracted to it. A study found out that the expanded conception of principal's responsibilities including a policy environment that increasingly holds school leaders accountable for increasing student achievement makes the position less appealing to teachers is the study of (Russell & Sabina, 2014). Another similar finding showed that that with the changes in society and increasing expectations of school leaders, there is a broad international agreement about the need for school leaders to have the capacity needed to improve teaching, learning and pupils' development and achievement. With this, there is already an increasing number of countries that are struggling to attract well-qualified applicants to take on leadership responsibilities. These situations and challenges prompt to create a leadership pipeline for school leaders which must be included in the succession plan (Brauckmann & Pashiardis, 2012).

Succession planning is more than about searching and appointing a new leader. Instead of hiring and hoping, school authorities must adopt a "grow-your-own" philosophy. Growing your own leaders will secure a supply of prepared leaders even in crises (Fink, 2011). It will avoid and reduce the expense of recruiting widely including high costs of turnover and demotivation, when "outside leaders" are brought into established settings and reduces the amount of time for new leaders to adjust because they already understand the culture and structures of the organization.

Leadership talents and skills should be evaluated not only in terms of its ability to meet the present needs but the future as well. Meaning to say, the current leaders should look through a wider lens from the ranks of the organization in order to ensure they are nurturing a diverse set of talents and skills that will take the organization forward. Based on

what we understand about the importance of school leadership, maintaining a school and consequences of frequent transitions, leadership succession planning appears to be a significant work of present leaders. Having a leadership succession plan will keep the whole organization on mission and do not just offer stability during crisis. By keeping in mind that leaders will eventually be replaced, it will anticipate any eventuality including designing job descriptions and responsibilities with change, growth and development as serious considerations.

### **Training and Development: Provided or Neglected?**

Mentoring can be considered one of the engagements that can be done in molding future educational leaders in the pipeline. But, this is not sufficient to fully prepare them. It is also a must to include a well-designed training and development program, that is aligned and responsive to the needs of schools today. Leadership has evolved over the years, which is a big departure from the scientific and bureaucratic style. Transformative leadership, servant leadership, shared leadership, distributed leadership and collaborative leadership are some of the leadership terms and theories, which have emerged and will continue to be adapted and embraced by present and future leaders of organizations.

There is a need to provide for high quality training to future principals. All pre-service principal training programs recruit people who show the potential to become effective principals and give them high-quality training that responds to district needs (Mendels, 2012). A study pointed out that a critical component of succession management and planning is the development of aspiring leaders (Zepeda, Bengston & Parylo, 2011). Hence, future leaders may not be able to do their tasks effectively if they will not be subjected to appropriate, reflective and meaningful training and development.

In the Philippines, as per Department of Education Order No. 97 s. 2011, applicants for the head teacher and principal positions

are required to have attended trainings, before they can apply and be promoted. Under the “training criterion”, applicants are required to have attended 24 to 56 hours of relevant and related training which are initiated, sanctioned and recognized by DepEd and should not have been used in the last promotion. In the private schools, though not clearly specified in the Manual of Regulations for Private Schools, it emphasizes on managerial competence, which means that any teacher or academic head should have undergone training on leadership and management before he/she can be promoted to a higher academic position. The detailed requirements are to be set by every governing body of the school. Therefore, these imply the importance of training and development, before a teacher or an academic head be promoted to a higher position.

### **Succession Planning: A Part of the Institutional Structure, Systems and Governance or Not?**

In the past, succession planning was not given much importance because leaders only looked for replacement based on who are available to fill up the vacant positions. However, based on the emerging discussions, researches and theories on leadership, organizational leaders have started talking about succession planning. Being taken seriously, it is already gaining ground and introduced as a significant plan that is essential in leadership sustainability including the realization of the vision of the organization. With the traditional perception that leaders will stay in power until they retire starting to diminish rapidly, organizations have started to implement and observe the term of office for leadership positions. This is now becoming part of the institutional structure, systems and governance, considering that changes are expected and a new group of leaders will be appointed.

Organization leaders must practice and execute the establishment of a supportive organizational culture through an active chief executive officer and senior management participation in the development of programs

including performance appraisal and rewards system that will reinforce managerial engagement (Groves, 2006). It is evident that succession planning and management requires extensive ongoing organizational commitment across all levels. A key component for effectiveness was identified as having support for the process from the lowest to the highest level and all the way down the line (Taylor & McGraw, 2004). The organizational management must be prepared to provide support and development opportunities for employees who are identified as high potential.

In the Philippines, DepEd has a provision through DepEd Order No. 97 s. 2011 on the promotion and appointment of teachers to higher positions. Requirements and criteria are clearly set including the processes involved. Moreover, Sections 30 and 31 of Batas Pambansa 232, Section 108 of the Corporation Code and Article XIV, Section 4 (2) of the 1987 Constitution state that how a school is organized determines its efficient and effective operation and the achievement of its functions and aims. The framework for the internal organization of schools is provided in these guidelines. Policy formulation shall be vested upon organized body persons which may vary, depending on the school ownership, its juridical status, the classification of its education programs and other factors. For private schools in the Philippines, the 2011 Revised Manual of Regulations for Private Schools in Basic Education states the rules and guidelines in the promotion or appointment of school heads. The Compendium of Education Legislation for Private Basic Education (2011) states under administration that “Every private school shall have a governing board which shall exercise general supervision, have exclusive control and direction of all funds, prescribe policies, make rules and regulations and establish practices consistent with law for the governance and direction of the school.” With regard to the school head qualifications, Section 55 states the qualifications of a school head. He/She including his assistants, if any, shall possess such appropriate educational

qualifications as may be prescribed by the Secretary and shall have adequate experience in school administration or management or its equivalent, at the time of his/her appointment. The school head must be a Filipino citizen, possess at least a master's degree or a professional license requiring a bachelor's degree, have adequate teaching experience, managerial competence and technical expertise in school management or have a background of demonstrated service and competence in his previous field of endeavor and be of good moral character.

Looking at these policies in the Philippine school systems, there is a clear structure and system in the promotion or appointment of school heads. In the public schools, the creation of promotions board, at appropriate levels is the responsibility of the Secretary of Education while in the private schools, the governing board has the authority to create policies and procedures in the promotion and appointment of school heads. The criteria for public school heads are very clear including the points, while in the private schools, the principals should possess a master's degree and the governing board decides on the other criteria. For private schools to have a good structure and system in the promotion and appointment of principals and school supervisory officials, it must clearly set the policies and other criteria aside from the minimum requirements stated in the Manual of Regulations for Private Schools. It will also make a succession plan clearer.

One of the four domains found in the Philippine Catholic School Standards which was published in 2016 is governance and leadership as one of the four domains. Notably, one of the fifteen (15) standards states "An excellent school develops and empowers its personnel to become professional and morally upright in the pursuit of the vision, mission and goals of the school. In addition to its program for spiritual formation, character development, professional growth and community building, the school supports opportunities for the personnel to design programs for their

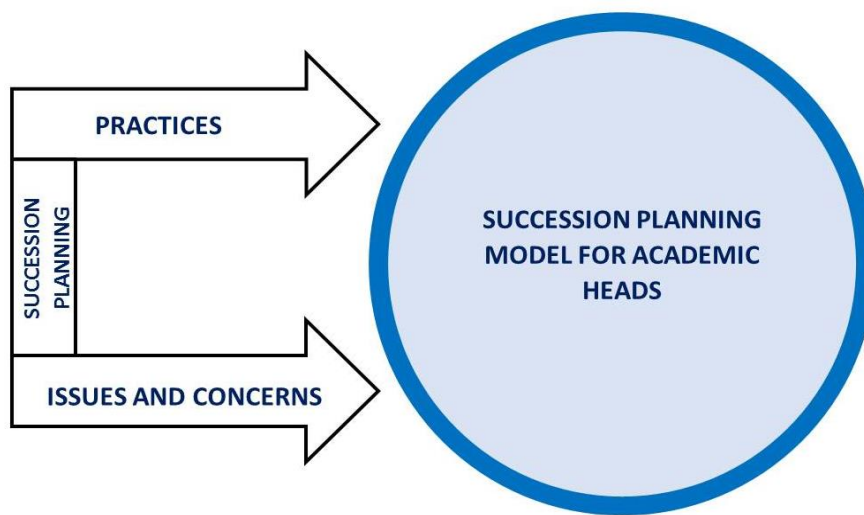
personal growth. Formation programs for the personnel are therefore differentiated to address their individual needs and differences. These lead each personnel towards full maturity in all dimensions of human life." It suggests and recognizes the importance and need to address leadership issues and concerns in Catholic schools today.

In developing a succession planning model, it must also address and prepare future school leaders for the challenges of today's school leadership, including the competencies found in the Competency Framework for Southeast Asian School Heads developed by Southeast Asian Ministers of Education Organization Regional Center for Educational Innovation and Technology (SEAMEO INNOTECH) in 2014. This framework has five domains namely managerial leadership, instructional leadership, strategic thinking and innovation, stakeholder engagement, and personal excellence. It was developed to ensure that it remains responsive to the challenges and changing contexts and needs of school heads including the communities they serve.

Succession planning is one of the important leadership issues being discussed in the Philippines. Specifically, succession planning models that can be adopted in the Philippine setting is few or perhaps non-existent most especially for schools particularly in basic education. The succession planning model is hoped to address the needs of leadership succession in schools particularly in these private sectarian schools which will be a stronghold in school leadership sustainability. Creating a succession planning model will strengthen the school's viability as it brings life, dynamism and relevance to its mission. Based on the foregoing discussion, succession planning will lead to the success of the mission.



## 1. Framework of the Study



**Figure 1. Framework of the Study**

## 2. Methodology

The researcher used participatory research method in this study. According to Howard et al. (2013), participatory research comprises a range of methodological approaches and techniques with the objective of handing power from the researcher to research participants, who are often community members or community-based organizations. In participatory research, participants have control over the research agenda, including the process and actions. Most importantly, people themselves are the ones who analyze and reflect on the information generated in order to obtain the findings and conclusions of the research process. Participatory research involves both inquiry and action. People not only discuss their problems, but they also think about possible solutions for them and actions which need to be taken. It uses a range of techniques, which include focus group discussion and multi-stakeholder meetings, participatory inquiry, action research, oral testimonies and story collection as a foundation for collective analysis, photo- digital stories, photovoice, drawing and essay writing competitions, participatory video and immersions.

In the context of this study, participatory research was used to draw out from the participants of the study the practices, issues and concerns in the selection and appointment of academic heads, including the key areas of a succession planning model. The researcher conducted workshops using the Key Judgment (KJ) technique developed by Jiro Kawakita, a Japanese anthropologist. According to Spool (2004), the KJ method also called affinity diagram allows groups to quickly reach a consensus on priorities of subjective, qualitative data. He added that one of the most amazing things about the KJ Method is how well it objectively gets groups to the top priorities. The KJ Method or affinity diagram organizes ideas, problems and solutions into related groups after a brainstorm. It helps categorize and organize a large number of fragmented uncertain information into logical cohesive groups. The goal is to create a limited number of groups. This results in better idea selection or a problem that is better understood. Different groups can analyze the same data and will often come to the same results. The KJ method specifically observes the following process : 1) determine a focus question 2)

organize the group 3) put opinions (or data) onto sticky notes 4) put sticky notes on the wall 5) group similar items 6) naming each group 7) voting for the most important groups 8) ranking the most important groups. After the workshops, the researcher conducted focus group discussions and interviews (oral testimonies and story collection) in order to gather in-depth data about succession planning including criteria, policies and procedures based on the knowledge, ideas and experiences of the participants.

The purposive sampling was used to identify the participants of the study, since it involved the directors, administrators, academic heads, human resource heads and teachers. For the workshops, the principals, human resource heads and selected assistant principals, subject area heads and teachers from the basic education department of the five private sectarian schools participated in the study, particularly in the workshops. On the criteria for the selected assistant principals, and subject area heads, they must have been with the school for at least ten (10) years and in a supervisory role for at least three (3) years. For the selected teachers, they must have been with the school for at least ten (10) years. Having been with the school for ten years indicates that they have considerable knowledge and experience of the school system and processes, so with leadership. Based on these criteria, he asked the assistance of the principals to identify the participants from their respective schools who can share and contribute seriously in the study. There were forty-two (42) participants in the workshop.

In the focus group discussions, the participants of the first focus group discussion (FGD 1) were the chancellor and directors governing the educational centers and selected principals of the educational centers, while the participants of the second focus group discussion (FGD 2) were members of human resource compliance team of the religious congregation. There were seven (7) participants in first focus group discussion and four (4) participants in the second focus

group discussion. In the interviews, the participants were the provincial administrator, School 2 administrator, educational center director for pastoral affairs and two former school principals (School 2 and School 3) who are still employed in their respective schools and holding supervisory positions as human resource officer and institutional affairs officer, respectively. Five (5) school administrators and former principals were interviewed.

Informed consent was obtained from all participants before conducting the study. They were told that utmost confidentiality will be observed from the names of the participants to the data obtained in the study.

The interview questions were validated by experts on educational leadership and management. To gain comfortable level of confidence in using the KJ method, three test runs were conducted to administrators and teachers who were not actual participants in the study. Since the results of the test-runs yielded the usefulness of the method for the workshops, they recommended that the KJ method will be useful in drawing out the data needed in the study.

The following questions were asked during the workshops:

1. Based on your knowledge and experience, how does the administration select and appoint academic heads? (practices)
2. What should be the criteria in the selection and appointment of academic heads? (follow-up question)
3. How does the administration prepare potential academic heads for leadership roles? (practices)
4. Were there issues and concerns encountered in the selection and appointment of academic heads? If yes, what were the issues? (issues and concerns)
5. If you would create a succession plan (for principals and assistant principals) for the religious congregational schools, what should it have (components, elements, areas)?

6. From the data generated based on the questions, what insights, ideas or realizations do you want to share?

For the results of the focus group discussions and interviews, data were to be organized and to be presented for comments and suggestions of the participants. From there, it determined if the results of the workshops, group discussions and interviews are similar, interrelated or have different or unique responses.

In analyzing the data, they were organized, categorized and labeled by the participants as indicated in using the KJ method. The data from the focus group discussions and interviews were coded and organized based on the themes that emerged from the workshops. Additional themes that came out from the focus group discussion and interviews were added. Coding is the process of organizing the data by bracketing chunks (or text or image) and writing a word representing a category in the margins. It involves taking text data or pictures gathered during the data collection, segmenting sentenced (or paragraphs) or images into categories and labeling those categories with a term, often a term based in the actual language of the participants. The use of the coding process generates a description of the setting or people, as well as categories or themes for analysis (Creswell, 2014). The

data that were collected from the workshops (principals, assistant principals, subject area heads, and selected teachers), focus group discussions (overall school directors and human resource compliance team) and interviews (provincial administrator, deputy director, former principals, selected officers of the human resource compliance team) including the personnel policy handbook of schools and manual of human resource policies and procedures for schools and training centers were triangulated.

This study could have observed all features and processes of participatory research method. However, only the key features of participatory research namely identification, definition, and discussion of the issues and concerns, and designing of planning and interventions were adapted. The evaluation of the processes and outcomes was not observed due to the permission granted by the school officials. Had all the features of the participatory method been observed, the study could have generated more data particularly in the enhancement of the proposed succession planning model.

### III. RESULTS AND DISCUSSION

1. What are the practices in selected private sectarian schools in the selection and appointment of academic heads ?

There were two practices observed in the selection and appointment of academic heads which are found in Table 1.

**Table 1.** *Practices in the Selection and Appointment of Academic Heads*

Main Practices	Specific Practices
Administration's Preference	Preferred Choices Choice of priests Submission of list of candidates
	Process Decision of House Council (religious) Recommendation from the present heads Survey
	Spirituality Charism Culture

Character  
Personality  
Academic Qualifications  
Educational Qualifications  
Performance  
Performance Evaluation  
Leadership Skills  
Experience  
Academic Experience  
Tenure  
Loyalty

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Firstly, it is administration's preference. The participants are aware that it is the rector and the house council that select and appoint the academic heads and other leadership positions in school. Led by the rector, the house council is the highest governing body of every school. However, the teaching and non-teaching personnel are not aware of the guidelines and processes that are observed in making decisions. They are aware that the department head is asked to make recommendations but the policies and procedures are not written. Also, different policies and procedures are observed in the five schools.

Such authority to make decisions on the selection and appointment of academic heads is supported by the 2011 Revised Manual of Regulations for Private Schools in Basic Education. In the Compendium of Education Legislation for Private Basic Education (2011), it states under administration that every private school shall have a governing board which shall exercise general supervision, have exclusive control and direction of all funds, prescribe policies, make rules and regulations and establish practices consistent with law for the governance and direction of the school. As a school, it exercises its authority and prerogative to appoint a lay person as academic head guided by the policies of the school.

This practice is related to the process observed that every organization be it business corporations or schools in the selection and appointment of future leaders. The decision-makers are guided by the policies in observing the process.

Secondly, it is the criteria for selection and appointment of academic heads. The participants perceived that the criteria in the selection and appointment of academic heads are academic qualifications, character (spirituality), performance and experience. In particular, they knew that the academic qualification for the principalship is a master's degree, since this is a documented policy for all private schools. This is only their perception because the criteria are not found in the personnel policy handbook or any memoranda issued by the school. Table 1 shows the main practices which are the administration's preference and criteria in the selection and appointment of academic heads, and the specific practices related to the main practices.

This criterion is found in the 2011 Revised Manual of Regulations for Private Schools in Basic Education. Academic qualification for private school principals is clearly stipulated in Section 56 which states that "He/She shall hold a master's degree and should have at least five years of relevant teaching or of administrative experience." The importance of complying with the requirements in terms of qualifications is supported by Catholic schools. This is reflected in the Philippine Catholic Schools Standards (2016) particularly in the area of leadership and governance that school leaders possess the personal qualities and professional qualifications required by their positions. In addition to meeting the minimum professional qualifications required by the relevant regulatory body, they undertake advanced studies and regularly update

themselves on the developments and latest trends in their field to enhance the conduct in their work.

The aforementioned practices are in consonance with the policies set in every organization. All appointments are made by the top officials of the school and the criteria which includes educational qualifications, tenure, experience, and character are all found in the laws. When legally and morally followed, the appointment will be objective and acceptable.

1. What are the issues and concerns in the selection and appointment process of faculty members to academic head positions ?

In terms of the issues and concerns in the selection and appointment of academic heads, four themes were abstracted namely objectivity of decision, professional growth, spirituality and culture, and motivation which are found in Table 2.

**Table 2** *Issues and Concerns in the Selection and Appointment of Academic Heads*

Themes	Issues and Concerns	Practices
Objectivity of Decision	Administration's preference Unclear policies and procedures	Administration's preference
Professional Growth	Lack of educational qualifications Lack of training and preparation	Criteria of selection and appointment
Spirituality and Culture	Lack of training and preparation Reluctance to accept	Criteria of selection and appointment
Motivation	Reluctance to accept	

The issues and concerns related to objectivity of decision are administration's preference, and unclear policies and procedures. With no clear bases for the selection and appointment, these make the decision subjective. The participants said that administration's preference and decision is more subjective than objective. With or without policies, the superiors will make a decision based on what they prefer. In most cases, the decision becomes more personal. In the process, there are more qualified candidates who were not chosen because of the influence of the other religious administrators. They also said that the decision is more subjective due to unclear policies and procedures. The participants also said that there are no clear policies and procedures in the selection and appointment of academic heads. The criteria are not found in the personnel policy handbook or any

memoranda issued by the administration. It is not clear if there is really a term of office, for there are heads who have overstayed or are overstaying. The policies are practiced but not documented. In other words, only the administrators know the policies. They have never been clearly communicated to teaching and non-teaching personnel. All five schools have different policies and procedures in the selection and appointment of academic heads.

The lack of educational qualifications, and lack of training and development were the issues that came out which are about professional growth. Teachers need to be encouraged to take graduate studies and be given more opportunities to attend conferences, trainings, and workshops. On the lack of educational qualifications, the participants recalled that in the first group of lay principals appointed in 2001, some of them did not have a master's degree. They

were sent to graduate studies to qualify for the principalship. However, some were replaced by members of the religious congregation for not completing the degree during the prescribed period. Today, four schools have lay principals and one school has a principal from the religious congregation. Except for one school, there are few candidates for principalship and assistant principalship due to lack of educational qualifications. Another issue is lack of training and preparation. The participants claimed that there is no formal leadership training and preparation for incoming and new academic heads. There used to be a scholarship program for the religious and lay people. Academic heads are appointed, despite lacking in experience and training. There is no mentoring, orientation, clear transition and turnover of responsibilities that make it difficult for the new academic heads to adjust to their new responsibility. They have to find their way and learn from experience in order to become confident academic heads.

The spirituality of the schools is also the culture of the organization. According to the participants, the faith and spiritual development programs for teachers need to be improved for it will prepare the teachers more in accepting leadership responsibilities in the future. Teachers are reluctant to accept the appointment as academic heads because they feel unprepared spiritually and psychologically for it. Professional training and development is not sufficient to make a teacher prepared for leadership position. The participants agreed that all teachers particularly future academic heads should be provided with spiritual formation programs which are the most important preparation before assuming any leadership roles. Through this formation, it will lead the teachers in making their personal vision aligned with the vision of the institution. Therefore, the spiritual development program needs to be improved which must be responsive to the needs of the faculty. Teachers are reluctant to accept the appointment because they feel unprepared for the leadership responsibilities. Those who

initially declined, but eventually accepted the position said that their commitment and love for the school were very influential in their decision. Their commitment to the institution was brought about by the spiritual formation that they received from the school. Some are reluctant to accept because they feel morally and spiritually unprepared.

In relation to the motivation of teachers to accept appointment to leadership positions, the participants said that academic heads and teachers are reluctant to accept the appointment because they are unprepared for the position. They lacked confidence and felt inadequate for they need to acquire more leadership competencies and gain more experience. The demanding work and stresses related to it make the position unattractive but some have accepted the appointment because of their commitment and love for the institution. They also admitted that an attractive compensation will be a significant factor in accepting leadership roles like the principalship and assistant principalship.

These issues and concerns will be addressed through a well-prepared succession plan. The objectivity in the selection and appointment of academic heads is important for it leads to having the most qualified and competent educational leader. This cannot be achieved if the policies and procedures are unclear which will make the administration decide in a very subjective manner. Succession planning will address and settle this issue for it will make the policies and procedures clearer and objective, and provide guidance to the academic community particularly the administration in making a decision. When the policies and procedures are unclear, it will be open to biases and criticisms from the stakeholders due to a subjective decision.

Succession planning will make this happen for it will look into these concerns. Succession plan engenders loyalty and stability. Employees who know that they are destined for increased responsibility and the benefits associated with promotion and advancement tend to remain loyal to the organization. They feel valued and affirmed

as employees. This typically provides a level of stability and continuity that benefits the organization in many ways (Calareso, 2013). Incidentally, succession planning and management can be a means by which to improve employee morale by encouraging promotion from within. Indeed, promotions from within “permit an organization to utilize the skills and abilities of individuals more effectively, and the opportunity to gain a promotion can serve as an incentive.” Once that goal is achieved, the promoted employee’s example heartens others. Moreover, particularly during times of forced

layoffs, promotions from within and “inplacement” (movements from within of individuals otherwise slated for layoff) can boost morale and can help offset the negative effects of “survivor’s syndrome” (Rothwell, 2010).

1. Based on the findings, what succession planning model can be developed for the private sectarian schools?

Based on the practices, issues, and concerns, the key elements of succession planning are identified as shown in Table 3.

**Table 3** *Key Elements of Succession Plan Based on Practices, Issues and Concerns*

Key Elements	Issues and Concerns	Practices
Vision-Mission	Objectivity of Decision Administration’s preference  Unclear policies and procedures	Administration’s preference
Spirituality and Culture	Spirituality and Culture Lack of training and preparation  Motivation Reluctance to accept	Criteria of selection and appointment
Institutional Policies, Processes, and Procedures	Objectivity of Decision Administration’s preference  Unclear policies and procedures	Administration’s preference
Professional Growth	Professional Growth Lack of educational qualifications  Lack of training	Criteria of selection and appointment

---

and  
preparation

Motivation  
Reluctance to  
accept

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The first key element is vision-mission refers to the school's higher goals or aspirations for the future which can be achieved through its purpose, commitment and values. It addresses the issue on objectivity of decision in particular administration's preference, and unclear policies and procedures. It is important that succession planning is anchored on the vision-mission of the school. It should be aimed in helping the institution realize its vision-mission through its programs, policies, and activities. Leadership succession planning process will be developed and implemented by clarifying future strategic directions that embrace the vision, mission, culture, and emerging priorities of the school (Canavan, 2001).

The second key element is spirituality and culture which refers to the formation programs on spirituality and teachings of the founder of the religious congregation which is educating and evangelizing the young through the preventive system of education - reason, religion, loving kindness. Through this element, the spiritual character of future leaders will be enhanced which will motivate them to take leadership responsibilities. The culture of the school is important to be understood before doing any succession planning. The spirituality of the five schools is also its culture. From the vision-mission to the culture of the organization, the administration will be able to reflect and prepare policies, programs, and activities related to succession planning. Administrators should understand the school organizational culture so that all endeavors on

succession planning are culturally fit. Founders and top executives tend to have prescribed theories of their own about how groups should work and they usually select colleagues and those who report to them who they believe will think and act like them. What these founders pay attention to, measure, and control become primary embedding mechanisms to create an organizational culture which supports the personal values and beliefs of the founder (Fancher, 2007).

The third key element is institutional policies, processes, and procedures which refers to the school's policies, procedures, and organizational set up which govern the decisions, behaviors, involvement, and participation in fulfilling the organization's vision-mission. The issue on objectivity of decision particularly administration's preference, and unclear policies and procedures will be resolved. Better and acceptable decisions will be made. The institutional policies, processes, and procedures particularly the leadership standards should be set and implemented to make the selection and appointment of academic heads objective. Likewise, it will enable the administration to observe a "proactive filling" (succession planning) which is used to build a supply of leaders by anticipating future needs and preparing for vacancies ahead of time. In the Hanover Research (2014) on succession planning, it pointed out the need to set the criteria and other policies. It emphasized that effective succession plans are able to clearly define the assessment standards against which new and



experienced administrators are measured. These standards allow districts to continue identifying leadership candidates as needs evolve, thus sustaining the succession programs. Without clear criteria to regulate assessment and qualification standards, districts threaten to return to reactionary hiring practices.

The fourth key element is professional growth which refers to the leadership preparation program and formation for future school leaders that develops their knowledge, skills, and competencies including their personal traits through graduate studies, shadowing, coaching, job assignments, assessment, feedbacking, and on-the-job training. Quality leadership programs and trainings will be provided to future school leaders who may seem unprepared and reluctant to accept leadership roles.

Ensuring the professional growth of teachers particularly the future academic heads will respond to the issue on lack of training and preparation. Succession planning must include the provision for leadership

development program to ensure the readiness of future academic heads when they assume leadership roles. In a study on succession planning, it found out that prioritizing leadership development in Holy Cross schools will help build a reservoir of prospective leaders who have been formed specifically as Holy Cross leaders. By doing so, this will not only benefit the schools where these emerging leaders currently work; it will also deepen the pool for other Holy Cross schools. Just as two of the newly appointed heads of school in Holy Cross-sponsored schools were trained and formed while holding mid-level leadership positions in other Holy Cross schools, so too could this pool increase and thereby deepen the bench of prospective leaders for Holy Cross schools (Clark, 2015).

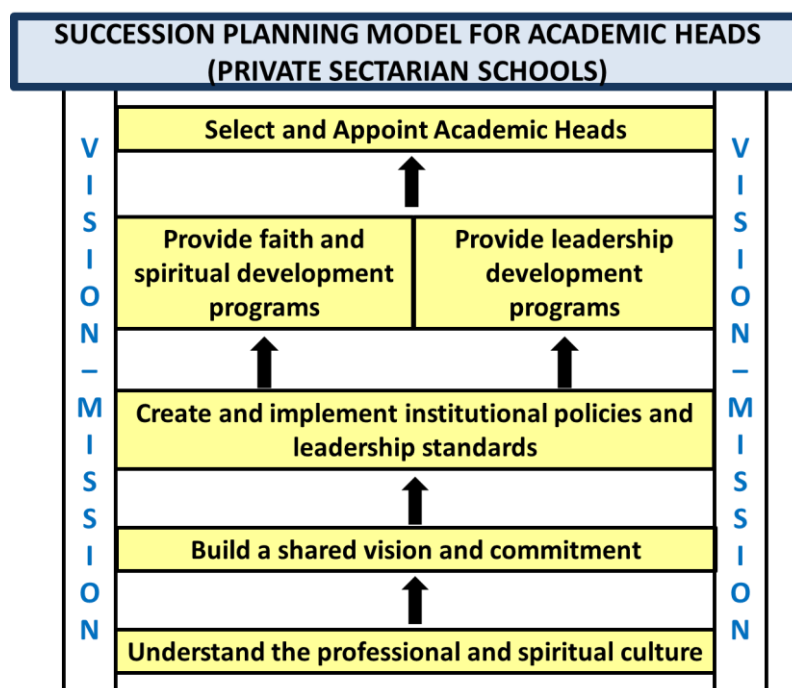
Based on the findings of the study, a succession planning model for academic heads is developed with the concepts particularly the steps were drawn from the issues and concerns, and key elements of succession plan as shown in Table 4.

**Table 4** Steps in Succession Plan Based on Key Elements, and Issues and Concerns

Steps	Key Elements	Issues and Concerns
Vision-Mission	Vision-Mission Institutional policies, processes, and procedures	Objectivity of Decision Administration's preference Unclear policies and procedures
Understand the school organizational culture  Build a shared vision and commitment	Spirituality and culture	Spirituality and Culture Lack of training and preparation Reluctance to accept
Set and implement leadership standards	Institutional policies, processes, and procedures	Objectivity of Decision Administration's preference Unclear policies and procedures
Provide personal and moral development programs	Spirituality and culture	Motivation Reluctance to accept

Provide leadership development programs	Professional growth	Professional Growth Lack of educational qualifications Lack of training and preparation Reluctance to accept
Select and appoint academic heads	Qualified and competent academic heads	Qualified and competent academic heads

Figure 2 shows the steps in succession planning incorporating the key elements which will address the issues and concerns, and enhance the policies and practices in the selection and appointment of academic heads :



**Figure 2. Succession Planning Model for Academic Heads**

The steps in the succession planning model are critical in the success of the vision-mission of the schools. The foundation of the succession planning model is the vision-mission of the school. All policies, programs, and activities of the succession plan emanate and should be aligned with the vision-mission and other related institutional programs of the school. This should be communicated and explained clearly to all stakeholders. Once the vision-mission is clear, it is important to understand the school organizational culture. Any succession planning must look into the present culture of the school. The realization

of the vision-mission depends on the behavior of the stakeholders. It should also examine the professional and spiritual culture permeating in the school before developing any program related to leadership preparation. A culture of leadership and commitment must be created and developed involving the administration and faculty. The formulation of the vision-mission of the institution and the rationale of the succession plan must be a collaboration between the administration and the faculty. The needs including the issues and concerns on leadership can be identified and resolutions can be made. Institutional policies, processes,

and procedures related to leadership and succession planning can be formulated, communicated, and implemented. Likewise, leadership standards are established which will be the basis in the development of faith, spiritual, and leadership programs. A leadership pipeline can be created wherein future academic heads are identified and provided with leadership development programs. Having formulated the institutional policies, processes, and procedures, and leadership standards, faith and spiritual programs are developed and provided to all teachers. Likewise, leadership development programs are developed and provided to teachers who are in the leadership pipeline. When the term of office of the academic heads is about to end or a vacancy occurs, the administration can select and appoint academic heads who are qualified, prepared, motivated, and committed.

The succession planning model aims to not only to address the issues and concerns but more importantly to provide a step-by-step process that will bring about leadership sustainability for all schools. It will guide the administration in developing a succession plan that is anchored on the vision-mission and prepare future academic leaders spiritually, professionally, and psychologically.

#### **IV. CONCLUSIONS**

Based on the findings of the study, it can be concluded the practices in the selection and appointment of academic heads in the five private sectarian schools are different and not communicated clearly which created confusion and discontentment among teachers. The objectivity of the decision of the administrators in the selection and appointment of academic heads is an issue because of the unclear policies, processes, and procedures. The absence of written policies and procedures makes the selection and appointment of academic heads more subjective than objective. The policies, processes, and procedures including the criteria in the selection and appointment of academic heads must be clearly set and

implemented that will guide the administrators in making a more sound and objective decision. Teachers are reluctant to accept leadership responsibilities due to unreadiness brought about by lack of relevant leadership training and preparation including spiritual formation programs for teachers particularly the future academic heads. Professional, personal, and spiritual development programs will make them prepared, confident, and motivated in accepting leadership responsibilities. The absence of a succession plan has led to the instability of leadership in the schools, which are in reference to insufficient qualified candidates, lack of professional training, and reluctance to accept the appointment. The identified key elements of succession planning are necessary in providing a more integrated and meaningful approach to leadership preparation and sustainability. Future academic heads will be prepared professionally and spiritually according to the charism of the founder leading to the appointment of the most qualified candidate(s). The spirituality and culture is a very important element in a succession plan. The administration must develop and provide teachers with a more meaningful faith and spiritual formation in order to make them psychologically and morally prepared as educational leaders according to the vision-mission of the school, and the charism of the founder of the congregational school. Moreover, it will bring together the teachers and school administration in committing themselves in the realization of the vision-mission of the institution and their personal vision.

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