Leaving the Ship but Staying on Board: A Multiple Case Study of the Voluntary Shift from the Position of Leader to Teacher within the Same Educational Institution

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Attestation of Authorship

I hereby acknowledge that this submission is my own work and that, to the best of my knowledge and belief, it contains no material previously published or written by another person (except where explicitly defined in the acknowledgements), nor material which to a substantial extent has been submitted for the award of any other degree or diploma of a university or other institution of higher learning.

……..

Ian McLeod, 2009

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Abstract

The New Zealand education system has undergone some two decades of substantial reform. There can be little doubt that this has brought significant change to the nature of what is expected of people occupying positions of leadership in schools and educational institutions (Ball, 2007; Bottery, 2004; Codd, 2005). Against this contextual backdrop, and in the researcher's experience as a teacher and former holder of a position of leadership, there is an observable phenomenon of educational leaders stepping aside from position and yet continuing to work as teachers within the same workplace. Despite claims of a leadership 'crisis', and international acknowledgement of concern over the retention of educational leaders (Brooking, 2007; Brundrett & Rhodes, 2006; Fullan, 2005), the human experience of this phenomenon appears unrepresented in current research literature. The present study has sought to capture this experience through addressing the central research question "What is the lived experience of the voluntary relinquishing of the position of leader, yet choosing to remain within the same educational workplace?" In order to gather rich qualitative data, a descriptive multiple case study design was employed. In-depth unstructured interviews were carried out with eight educational leaders who had relinquished position within the contexts of New Zealand State Secondary Schools and Private Training Establishments, and chosen to continue working in these same contexts. The subsequent analysis drew on the tradition of hermeneutic interpretation (van Manen, 1990) to arrive at interpretations of the uniqueness of individual experiences, and offer understandings of the shared meanings of the experience in the form of essential themes. The key findings which emerged in this study were those of a sense of the 'a-lone-ness' of leadership, the 'ready-suddenness' of the decision to step aside, a seeking of 'balance' in the relinquishing of position, a powerful sense of 're-turning' to the call of teaching, and varying degrees of 'ease' and 'dis-ease' in the experience of 'letting go and holding on' following positional relinquishment. These findings serve to extend aspects of those of earlier leadership and role exit studies, and offer previously undocumented understandings. Thus, a major contribution of this study is in the bringing-to-voice of the stories of those who step aside from leadership position yet remain in the workplace, and in the opening of avenues for further research.

Chapter One: Introduction

Some two years ago it was with surprise and interest that I found myself sitting at a teacher's desk beside the person, now also solely teaching, who had employed me only weeks before. They had chosen to make a shift out of their leadership position and yet they had also chosen to remain within the school as a teacher. This transition fascinated me: the motivation, the timing, the way it was announced, and how it was received. What were the expectations of things changed, gained, and lost – and were they? How were subsequent relational exchanges in the staffroom played out? In short, what was the human experience of such a transition? In the strength of this encounter then, the seeds of the present study were planted.

Current research literature is curiously silent regarding this aspect of leadership experience. Certainly there is widespread acknowledgement of concern, both locally and internationally, regarding the turnover of educational leaders and the early exit from positions of headship (Bottery, 2004; Brooking, 2007; Fullan, 2007; Hargreaves & Fink, 2006; Stevenson, 2006), with some commentators referring to the current situation as a 'leadership crisis' (Brundrett & Rhodes, 2006; Gronn, 2003; Hartle & Thomas, 2003; Stevenson, 2006). While significant effort and a degree of research interest is being directed into systemic responses to this 'crisis'; for example, the establishment of programmes of principal preparation and development (Brooking, 2007; Cardno & Fitzgerald, 2005), and succession planning (Brooking, 2007; Fink & Brayman, 2004; Hargreaves & Fink, 2006; Rhodes, Brundrett, & Nevill, 2008), it may be argued that the emphasis of such interest is largely pragmatic and centred around 'fixing' the problem. As Ribbins (2007) contends, the current approach to leadership study and practice has a tendency to be "narrowly instrumental, obsessed with instant relevance … [and] fixated on the principal" (Ribbins, 2007, p. 13). Hence, there is scant evidence in the leadership literature of attention paid to the experience of leaders *after* they relinquish their positions, and only the beginnings of an interest in educational leaders other than principals (Cranston, 2007; Douglas, 2007).

Drawing on the field of role theory, a cursory glance in the direction of the experience of the voluntary relinquishment of position may be found in the existence of research

investigating role exit process (Ebaugh, 1988). However, these studies are sparse indeed. Furthermore, there is a dearth of such study applied to educational settings, and in particular, seemingly a complete absence of research specifically addressing the experience of those leaders who choose to step aside from position yet remain in the same workplace.

This study then, aims to explore and represent the experience of educational leaders who are voluntarily 'leaving the ship', that is, stepping out of leadership, but 'staying on board' in the same school or institution. As its focus, the present research has a central concern for the lived experience of eight leaders, capturing their experiences as fully as possible rather than pre-supposing a conformity to any existing theory or model. In this regard the study is thereby both deliberately exploratory and descriptive in nature.

A significant contribution of this research is in opening understandings in the neglected field of the experience of educational leaders who have voluntarily relinquished titled leadership position, yet remained in the same workplace. It presents the voices of those who have undergone such a transition, and in addition, serves to provide an enhanced insight into the pressures on educational leadership, the possibility of a deeper perception of ways to nurture both leaders and teachers, and a greater understanding of transitional processes involved in role shifts in education. It is hoped that the current study may both provoke, and provide a platform for, further investigation into this experience of educational leadership.

Researcher Positioning

As will be more fully articulated in the consideration of methodology found in Chapter Three, this study is underpinned by a constructivist theoretical framework. Consequently, it is held that the relationship between myself as the researcher, and what is being researched, is necessarily both subjective and interpretive. There is no pretence in this study of assuming a stance of epistemological objectivity but rather, at the outset I seek to make as explicit as possible my 'positioning' within the research in order that the influence of my own experiences and background may be identified. To this end it is highlighted that against a backdrop of some eighteen years of teaching across a range of institutions in New Zealand and abroad, I have held, and relinquished, a variety of leadership positions. More specifically, I have had the experience both of choosing *not* to accept a position of programme leader – thereby electing to return to a 'lesser'

position within the same workplace – and of voluntarily relinquishing a leadership position in order to return to teaching in another workplace.

This background positions me within experiences like those explored in this study, and sensitises me to the phenomenon in a such a way as to allow what Gadamer (1995) refers to as fore-structure, or 'prejudices', to arise from my own lived experience. It is important that an awareness of these pre-understandings be gained, and this has been achieved through processes of self-interview and interpretive analysis. Both these processes, and the researcher bias uncovered, are more fully described in Chapter Three.

The Research Journey

The journey undertaken in carrying out this research, while evidenced in a factual and procedural sense in the final written representation of this study, has had a far wider and more profound impact on me, as researcher, than can be captured solely in these pages. In addressing the central research question, this journey has been overtly exploratory in the sense of seeking to uncover understandings related to this question, and yet it has been no less a journey of discovery in a more personal sense, as will be indicated.

Although vitally interested in human experience, as an emerging researcher I was also concerned with what seemed to me to be the 'safety' and 'tidiness' of a closely structured research design. Thus, in initial pre-proposal conceptions of this study, I considered collecting data by asking a series of prescribed questions in a semi-structured interview situation, and intended to employ traditional forms of coding and content analysis in the analysing of data. However, in further reflecting on the intent of the study and issues of methodology, it became increasingly apparent that to more fully capture human experience in its richness, a greater degree of openness would be required. Hence, at this point, the decision to employ unstructured interviewing was made, and my interest in taking a hermeneutic stance in the analysis of data collected, confirmed. These decisions have had a significant impact on my experience of the research journey.

In selecting an unstructured interview format I found myself experiencing a greater sense of vulnerability in the interview situation than might otherwise have been the case had I pursued a 'safer' and 'tidier' data collection method. As unstructured interviewing is by its very nature not reliant on prescribed questions, there was an inherent

uncertainty as to which direction the interview might take and, consequently, an enhanced need to be highly alert and responsive to the experience being re-told. While this openness in direction was demanding, and to some extent daunting for me as the researcher, the heightened attentiveness to both what was being said, and importantly how it was being said, was valuable. In addition, this sense of researcher vulnerability seemed, on reflection, to be appropriate as a sharing of the vulnerability I was asking of participants in inviting them to tell their story. In this regard, there was perhaps a degree of levelling of the balance of power between 'interviewer' and 'interviewee', and the encouraging of a greater humanity and reciprocity in the data collection process. Indeed this was evidenced on several occasions where, after the recorder was turned off, I was asked for, and shared, my own story.

A second feature of this research journey has been for me, as inquirer, in the overriding sense of being humbled by the depth and honesty with which participants were willing to share their experience. In several instances people indicated that nobody had ever asked them for their story, or that in agreeing to be interviewed they had thought more deeply about these experiences. In one particular situation (which the participant has explicitly given consent to be able to be publicly acknowledged), an interview transcript took a significant period of time to be returned from the participant validation process. As this participant explained, the strength of the experience retold was such that they found themselves forced to contend with a powerful sense of anxiety and reluctance to revisit it in writing. The courage shown by this person in ultimately coming to a place of preparedness to relive and 'release' their story is immensely humbling and confirms for me that, in stepping aside from leadership position yet remaining within the institution, there can be an extremely potent element of leadership experience which has previously been unspoken of.

The potent and yet frequently unspoken nature of the relinquishment experience was further reinforced for me in the experience of presenting the initial understandings gained in this study at an international conference. That the session was well attended was heartening confirmation that there is indeed the recognition of the existence of an unexplored phenomenon, and furthermore, that the interest in this phenomenon crosses national boundaries. Once again I had the strong sense of being humbled when one conference delegate approached me, some time after the session, and began describing the sense of 'shame' embodied in their own experience of stepping aside yet remaining

in the same workplace. The strength of these human experiences are not to be taken lightly and have impressed on me, as researcher, the degree of responsibility required in capturing and representing such experiences.

Thus, with the firm intent of honouring the unheard voices of those who relinquish position yet remain in the workplace, I embarked on a research journey through which I have found myself changed both personally and professionally. That the personal journey begun here has been of value is attested to, and that it is an ongoing one is without doubt.

Overview of Report Structure

This report is organised into seven chapters. While this first introductory chapter has served to explicitly locate myself as the researcher within the research, and to give an indication of the research journey experienced, the following chapters concern themselves with the body of the study.

Chapter Two traverses the salient literature. Here attention is drawn to the context of globalised trends in educational leadership, the major findings of studies documenting the current experience of leaders are reviewed, and an exploration of existing models and theory with relevance to the relinquishment of leadership position is provided. The apparent lack of research into the experience of stepping aside from leadership yet remaining in the same workplace is identified, and the central research question motivating this study, subsequently presented.

The third chapter outlines the methodological framework adopted in this study including its constructivist underpinnings, the research design, and methods of data collection and analysis. In seeking to capture the richness of human experience, it is contended that the configuring of a descriptive case study design with hermeneutic analysis is both advantageous and justified. Researcher bias, as ascertained through a process of self interview and analysis, is made explicit and finally, considerations of ethical issues pertinent to this study, and research trustworthiness, are addressed.

A deliberate decision is made in the organisation of this report to present the findings of the study in two distinct chapters. As this study is exploring previously unreported experiences, the first of these two chapters, Chapter Four, seeks to honour the unique voices of individual participants by presenting crafted stories of their experience

followed by hermeneutic interpretation. This chapter reflects what perhaps might traditionally be regarded as a within-case analysis. In the second of these two findings chapters, Chapter Five, attention is turned to shared themes, or the universality of what is 'essential' (van Manen, 1990) across participant experience. In moving closer to the essence of the experience of relinquishing yet remaining, five major themes, with attendant sub-themes, are articulated.

Chapter Six provides a detailed discussion of the findings, organised under the headings of the five major thematic groupings articulated in Chapter Five. These findings are explored with reference to relevant literature and attention paid to aspects that were expected, and those that were not. Indications are provided of where the current findings support those of earlier studies in the literature, and where they diverge or offer previously undocumented understandings.

In closing, Chapter Seven of this report summarises the key findings, indicates the contribution of this study, evaluates its potential limitations, and advances some recommendations for further research.

Chapter Two: Literature Review

This chapter opens with a call to urgency in the exploration of leadership experience in education through the documenting of what some commentators refer to as a 'crisis' in recruitment and retention. It proceeds to examine the global and local context of this situation as a vital backdrop to the present study, and draws on existing research to highlight the current experience of leaders situated within this context.

It is acknowledged that within the literature there is a growing emphasis and research base pertaining to what may be referred to as systemic responses to the current challenges facing leadership (in a New Zealand setting; the Aspiring Principals Programme at the University of Waikato, the First-time Principals Programme offered through the University of Auckland, and the online leadership support website 'LeadSpace', for instance), to succession planning (Brooking, 2007; Fink & Brayman, 2004; Hargreaves & Fink, 2006; Rhodes, Brundrett, & Nevill, 2008), and to an advocacy for more distributed forms of leadership (Gronn, 2003; Gunter, 2005; Hargreaves & Fink, 2006). However, as the focus of this study is on the personal and experiential aspects of stepping aside from leadership position, and being mindful of the constraints of space and relevancy, it is not intended that these bodies of literature be explored in any great depth here.

While there are emerging calls for a deeper understanding of the human experience of the phases throughout leadership, including exit, and some stage models and theories advanced, this chapter highlights a noticeable gap in current research around the experience of leaders who voluntarily relinquish their position yet remain as teachers within the same workplace. It is this gap that the central research question presented at the close of the chapter seeks to address.

A 'Crisis' in Educational Leadership

There can be little doubt both experientially, and with reference to the literature, that the domain of educational leadership has been the site of significant challenge over recent times. Many commentators draw attention to what has been referred to as a 'leadership crisis' in education (Brundrett & Rhodes, 2006; Gronn, 2003; Hargreaves & Fink, 2006;

Hartle & Thomas, 2003; Stevenson, 2006) and, while the term 'crisis' may be argued to be somewhat emotive, it nevertheless serves to highlight the depth of concern regarding the recruitment and retention of educational leaders (Bottery, 2004; Brooking, 2007; Caldwell, 2006; Fullan, 2005; Mulford, 2003).

While this crisis, "characterised by falling numbers of applicants for school leadership posts" (Brundrett & Rhodes, 2006, p. 15), is under-girded in part by the ticking "demographic time bomb" (Fink & Brayman, 2004, p. 431) of the retirement of the cohort of 'baby boomers' in the United Kingdom (Brundrett & Rhodes, 2006), North America (Fink & Brayman, 2004; Gronn, 2003), Australia (Gronn, 2003) and New Zealand (Brooking, 2007), there are yet wider concerns. As Fullan (2003) points out "there is a huge need for new leaders and at the same time there is a set of conditions that makes the job unattractive" (p. 15). Fink and Brayman (2004) concur, observing that "many potential leaders do not perceive the role of Principal or Assistant Principal in a positive light" (p. 447), and indeed, based on a longitudinal study of schools in Ontario and New York State, note that these roles are "increasingly being associated with managing an agenda with which many professionals profoundly disagree" (p. 447). Cranston (2002), in the Australian context, moreover draws attention to the place of perceived disincentives in the difficulty of recruitment to leadership positions, and advocates greater consideration be given to "possible perceptions among aspirants who see disincentives for them if they consider the roles of principals to be too onerous" (p. 9).

In New Zealand, Brooking (2007) while again reinforcing the notion of crisis in highlighting "looming concerns about the supply of New Zealand school principals" (p. 3), makes an added distinction in referring to the lack of clear preparatory pathways into leadership positions. She notes that "New Zealand principals are only offered training *after* they have become a principal, and this training requirement is not mandatory" (p. 4, emphasis original), and subsequently alludes to the necessity of a more coherent policy response in her observation that there is "no national initiative to ensure and supply a pool of *quality* leaders under the self-managing model" (p. 3, emphasis original).

A further dimension to the leadership crisis may be found in the area of the retention of leaders and sustaining of leadership positions following appointment. In this regard

there is not only an accumulation of evidence of fewer applications for leadership posts, but indeed a growing acknowledgement of the emergence of a trend towards the increasing turnover of leaders and early exit from positions of headship (Bottery, 2004; Brooking, 2007; Fullan, 2007; Hargreaves & Fink, 2004; Stevenson, 2006). As Fullan (2007) summarises "more and more principals in almost every western country are retiring early; more and more potential teacher leaders are concluding that it is simply not worth it to take on the leadership of schools" (p. 159). Bottery (2004) further captures the concern surrounding this trend in his description of a rise in the western world of "educational professionals especially who are deeply unhappy with their work. This is seen in the number who wish to leave, those who want to take early retirement and those who are having to leave through ill health brought on by stress" (p. 88).

As it is apparent, then, that this 'crisis' in supply, recruitment, and retention of leadership is not simply a local phenomenon, it is important to examine in greater detail the global context of educational leadership. It is to this that attention is now turned.

Globalisation and Educational Reform

"A globalising world is now the context within which humanity lives and works, and educational leaders need to understand the challenges that originate at this level" Bottery contends (2006, p. 6). He, alongside other commentators, points with concern to the influence of globalisation on international trends in both education policy and practice in the last two decades (Ball, 2007; Bates, 2002; Bottery, 2004; Codd, 2005; Dimmock, 2003; Lauder & Hughes, 1999; Olssen, Codd, & O'Neill, 2004). Within the examination of this globalised context there is, in particular, a highlighting of the privileging of an economic discourse, and the subsequent ramifications of this for education, and indeed, the work of educational leaders.

Economic globalisation

While a number of forms of globalisation, including environmental, cultural, and political are acknowledged (Bottery, 2006), it is argued that economic globalisation is the most dominant, and in fact "not only sets the context for other forms of globalisation, but its language is increasingly used to describe their activities" (Bottery, 2004, p. 44). Under the dominance of an economic discourse there is an increased ascendancy of the market as a way of allocating resources (Bates, 2002), an "emphasis on economic functionality rather than the pursuit of things in their own right" (Bottery,

2006, p. 7), and a concern for "measurable returns on indicators of increased competitive advantage and economic growth" (Codd, 2005, p. 3).

Bottery (2004) further argues that as the influence of economic globalisation increasingly colonises the public sector, "the values of the private sector – primarily those of efficiency, effectiveness and economy – become the criteria of success, while other values critical to a rich education – like care, trust and equity – are increasingly perceived as second order values" (p. 45). This is confirmed in Ball's (2007) observation of a transformation in the nature of social relations through "a thorough subordination of moral obligations to economic ones" (p. 185). Moreover, in the expansion of an economic discourse into personal and cultural domains, it is asserted that there is trend toward the commodification and standardisation of cultural 'goods' whereby these increasingly come to be regarded as "articles or activities for consumption" (Bottery, 2006, p. 7). While it is acknowledged that "a blanket defence for the public sector as it is or was … is untenable" (Ball, 2007, p. 187), there is advocacy by a number of commentators in the field of educational leadership that, not only is it important to recognise the dominance of the forces of economic globalisation as a context of education, but also to critique the impact of these forces in the light of changing demands placed on education, and its leaders (Ball, 2007; Bates, 2002; Bottery, 2004; Codd, 2005).

Changing demands placed on education

Given the privileging of economic theory and the trend towards the globalising of international markets, it is perhaps unsurprising that interest would be turned toward the position and role of education in this process. As Ball (2007) asserts "education is increasingly, and indeed perhaps almost exclusively spoken of within policy in terms of its economic value and its contribution to international market competitiveness" (p. 185).

This is further supported in Bates' (2002) comments that "the current rediscovery of education as a national priority in advanced industrial societies is all but exclusively couched in terms of national economic survival in a ferociously competitive world" (p. 153). A significant body of literature documents the impact of economic globalisation on education (Ball, 2007; Bates, 2002; Bottery, 2006; Codd, 2005; Dimmock, 2003;

Olssen, Codd, & O'Neill, 2004), an impact which includes a reframing of the purposes and processes of education, and a period of widespread reform.

While there are local variants in the education reforms implemented across such regions as North America, Canada, The United Kingdom, Australia and New Zealand, the central themes of "policies of decentralisation, marketisation, privatisation, and the general subordination of education to economic objectives" (Codd, 2005, p. 3) are similar. Codd (2005), in his appraisal of the reform agenda in New Zealand, contends that under a neoliberal economic ideology, there was significant pressure on policy makers to undertake a radical shift in their conceptualising of education:

> From this ideological position, New Zealand Treasury officials argued that education should no longer be seen as an investment by the government into the wealth generating capacity of the nation, but as a drain on the nation's resources, keeping taxation high, stifling investment and providing benefits mainly to the individuals who received it, rather than to the nation as a whole. (p. 4)

This altered conception of education as resulting in the accrual of benefits primarily to the individual rather than the community gave rise to "the neoliberal claim that social affairs are best organised according to the general principle of consumer sovereignty, which holds that each individual is the best judge of his or her needs and wants, and of what is in their best interests" (Gordon & Whitty, 1997, p. 455). In this light there is a danger, Bottery (2006) argues, of education becoming "no more than a private consumable item, a positional good" (p. 15). If indeed, education is regarded as a positional good, that is, one "which provide[s] students with a relative advantage in the competition for jobs, income, social standing and prestige" (Marginson, 1997, p. 38), then there are in turn significant implications for its place in society and in the market.

The reform agenda, which has featured so strongly amongst a number of western education systems in the last two decades, has focused on the 'opening up' of education to market forces and the restructuring, Gunter (2005) suggests, of education "as a private good to be commodified and sold" (p. 49). Proponents of such reform would claim the market to be "liberating in the sense that teachers can meet the needs of those they are meant to be working for and so have a job based on performance" (Gunter, 2005, p. 49) and hence that education would correspondingly become "ostensibly more effective in delivering a service to consumers" (Codd, 2005, p. 4). In this regard,

educational institutions have been increasingly viewed as "a 'black box', and the educative process is considered to be a production process in which resource inputs are used to produce measurable educational outputs" (Codd, 2005, p. 8). In order to facilitate this marketisation of education there has been significant convergence around reformatory moves towards school-based management, curriculum standardisation, increased forms of accountability (Codd, 2005; Cranston, 2002; Dimmock, 2003; Fiske & Ladd, 2000; Nash & Harker, 2005) and, importantly, the assumption that "competition among schools through open enrolment would act to enhance quality" (Whitaker, 2003, p. 45).

The New Zealand Context

The New Zealand context of educational reform, against the backdrop of which the present study is conducted, mirrors that of international trends but with a rapidity of pace (Billot, 2003; Gordon & Whitty, 1997; Lauder & Hughes, 1999). The commencement of educational reform, underscored by the neoliberal ideology that "state intervention in education was neither equitable nor efficient" (Codd, 2005, p. 4) resulted in the launching of 'Tomorrow's Schools' in 1989. As Gordon and Whitty (1997) in their comparative evaluation of reforms in England/Wales and New Zealand point out:

> A key tenet of neoliberalism is that the private sector is the preferred site for the provision of services. This claim is underpinned both by a suspicion of the public sector as necessarily inefficient and by a positive embrace of the private which derives from a celebration of the 'neutral' forces of the hidden hand. However, although the governments' attempts at 'privatisation' have included increasing the encouragement of private sector involvement in the provision of education, the more prominent initiatives to date have attempted to make the public sector behave more like the private sector. (p. 456)

Hence, with the avowed intent of increasing "the responsiveness of the New Zealand education system and the satisfaction with education of all significant stakeholders" (Education Review Office, 1994, p. 2) the thrust of 'Tomorrow's Schools' signalled two significant structural changes:

> The first was to abolish all layers of administration between the central state agencies and the local school in order to locate decision-making as close as possible to the point of implementation and thereby achieve greater administrative efficiency and responsiveness. The second was to alter the

> balance of power between the providers and the clients of education. (Education Review Office, 1994, p. 2)

Thus, these reforms involved a decentralisation in the abandoning of regional education boards and the establishment of school-based, community elected, Boards of Trustees charged with the responsibility of meeting National Administration Guidelines (Ministry of Education, 2007), hiring principals and teachers, and ensuring the appropriate management of finances (Codd, 2005; Fiske & Ladd, 2000; Whitaker, 2003). The Education Review Office, established to provide a system of accountability for the 'quality' of local management, articulated the template for the new model as follows:

> The control and management structure of schools, which is commonly referred to as governance, is based on the model of a privately owned firm or company in which a board of directors elected by the shareholders has overall control and employs a chief executive with management responsibility. (1994, p. 1)

Indeed, a number of studies have documented the post-reform reality of New Zealand schools who found themselves "now function[ing] like small business firms" (Codd, 2005, p. 8) in an environment of competition for resources and students (Codd, 2005; Fiske & Ladd, 2000; Harold, 1999; Lauder & Hughes, 1999; Nash & Harker, 2005; Whitaker, 2003). The assumption made by market proponents was that as a consequence of the "combination of parental knowledge and consumer power … school performance will be driven up by the competition for students because school income will be determined by student numbers" (Lauder & Hughes, 1999, p. 18). This operation in an increasingly commercial environment, where education was viewed as a marketable commodity, facilitated, among other things, the upsurge in the number of Private Training Establishments to some 800 (Ministry of Education, 2003), and the subsequent boom in export education (Codd, 2005; Fiske & Ladd, 2000).

In 1999, with a change of government, there was some movement away from what has been referred to as a system "built on the twin pillars of self-governance and competition" (Fiske & Ladd, 2000, p. 274), and the subsequent emergence of "Third Way" policies (Codd, 2005; Nash & Harker, 2005; Roberts, 2005; Thrupp, 2005). In practical terms for schools this appeared to involve a reduction in the competition for students through the partial reintroduction of school zoning, and an end to the delegated

financial responsibility incurred by the 'bulk funding' of schools. While proponents suggest the 'Third Way' offers an alternative policy framework, neither fully reliant on free market ideology nor state provision, critics continue to regard this new framework as a 'softer' version of earlier policies, "committed to the neoliberal agenda of globalisation, albeit globalisation with a social face" (Codd, 2005, p. 9).

Changing Expectations of Educational Leadership

Within the context of globalisation and education reform traversed above, there is widespread acknowledgment that both the nature, and pace, of reform has had a significant impact on the expectations placed on educational leaders (Ball, 2007; Billot, 2003; Fullan, 2002; Gewirtz & Ball, 2000; Harold, 1999; McInerney, 2003; Stevenson, 2006; Thrupp & Willmott, 2003; Whitaker, 2003). Indeed, Gewirtz and Ball (2000) assert that in the climate of shifting discourses in education "the role, and sense of identity and purpose of school managers are being reworked and redefined" (p. 266). Dimmock (2003), furthermore, contends that "a consequence of globalisation is the emergence of generic or ubiquitous expectations of leaders" (p. 5) while Stevenson (2006), in his consideration of career paths into, and through, principalship draws attention to "overwhelming evidence [which] points therefore to the increasingly difficult nature of the role we expect principals to undertake (p. 409). Moreover, it is important to note that despite a dearth of study on the changing expectations placed on middle leaders (Cranston, 2007), commentators are beginning to recognise that "as principal's roles change, it is not surprising that those in positions close to the principal are also likely to change as a result" (Cranston, 2007, p. 16). These expectational changes, as they background the present study, may be summarised as including, but certainly not limited to, the necessity for the leader to be a conduit of change, and the influence of managerialism on role.

The leader as conduit of change

It is apparent in the climate of sweeping reform of the past two decades that dealing with change has become an unavoidable role of school leaders. In some quarters this challenge of leading change is viewed as exciting or even 'exhilarating' (Caldwell, 2006), while in others there is a rather less rosy view of "the unending fads that, like great tidal waves crash down on our schools" (Wheatley, 2005, p. 100). Regardless of viewpoint, however, it has become clear that the current practice of educational

leadership is unequivocally linked to change (Dimmock, 2003; Fink & Brayman, 2004; Fullan, 2007). As Dimmock (2003) observes:

> Continuous and evolving change, it seems, is endemic to policy and practice on an international scale. Leadership lies at the centre of such change in education, both as a key component in its own right and as a catalyst for the successful reorganisation of other activities. (p. 4)

There is an indication here of the increased expectation placed on leaders with regard to implementing change, and indeed elsewhere in the educational change literature commentators highlight "the leadership of the principal as a crucial ingredient in school improvement" (Fink & Brayman, 2004). While it is not the intention here to comment on whether the changes resulting from globalising forces represent 'school improvement' or otherwise, it is worthy of note that Fullan (2007) characterises the principal as "someone just as buffeted as the teacher is by wanted or unwanted and often incomprehensible changes – and, what is more, *expected to lead these very changes*" (p. 155, emphasis original).

At even a cursory glance through the burgeoning change literature, titles such as "Changing Leadership for Changing Times" (Leithwood, Jantzi, & Steinbach, 1999) and "The New Work of Educational Leaders" (Gronn, 2003), and the existence of a fourth edition of "The NEW Meaning of Educational Change" (Fullan, 2007, emphasis original) are further symptomatic of the prevalence and pace of change in education. In considering the volume of such literature on offer, it would appear the notion of successful principal has become somewhat synonymous with that of a successful change leader. As Fullan (2007) notes however, "the irony is that as the change expectations heighten, the principalship itself has become overloaded in a way that makes it impossible to fulfil the promise of widespread sustained reform" (p. 156).

The influence of managerialism

Alongside the forces of economic globalisation, and embedded within the neoliberal reform of education, there has been an increased managerial expectation placed on educational leaders. As Gewirtz and Ball (2000) in their consideration of the discourse of new managerialism in education, assert, "the market revolution is not just a change of structure and incentives. It is a transformation process that brings into play a new set of values and a new moral environment" (p. 266). Bush (2008) summarises this managerial

thrust as "a stress on procedures at the expense of educational purpose and values" (p. 274). More particularly, managerialism advocates the borrowing of business management techniques and their application to educational settings, with a corresponding emphasis on "economy (curbing the amount being spent), efficiency (getting the most out for the money being spent), and effectiveness (achieving as near as possible the aims designated at the beginning of the process)" (Thrupp & Willmott, 2003, p. 29). Indeed, Thrupp and Willmott (2003), in their comprehensive critique of the leadership literature in relation to managerialism, wryly observe that "managerial colonization occurs as school leaders are asked to take on the sorts of generic hints for effective business leaders found in airport bookshops" (p. 144). Certainly, the changing expectation that a school leader come to be regarded as the CEO of a business is found both enshrined in government policy documents – New Zealand's Education Review Office (1994) report on effective governance for schools, for example – and experienced in practice (Cranston, 2002; Fiske & Ladd, 2000; Gewirtz & Ball, 2000; Gunter, 2008; McInerney, 2003).

Fiske and Ladd (2000), in their fulsome evaluation of the reforms of 'Tomorrow's Schools' in New Zealand, note that "a major goal has been popular acceptance of the notion of the principal as chief executive officer" (p. 272), and draw attention to school principals' descriptions of increasingly working within a structure where "the assumption is that management is a skill in its own right, and that you don't have to know all that much about what it is that you are managing" (p. 272). Moreover, in drawing on a series of interviews involving Australian Public School Principals, McInerney (2003) observes that "in this culture of managerialism the meaning of principalship is being re-made" (p. 68), with the manner of this re-making being in the requiring of principals to increasingly be "good corporate players" (p. 63). He further contends that "in many respects, attributes of good school leadership are now being described according to business values and management practices rather than inclusive, educative and participatory forms of decision-making" (p. 65).

There is now a considerable body of literature variously reflecting, supporting, or decrying the influence of managerialism on educational leadership (Thrupp & Willmott, 2003), and it is not the avowed intent of the present study to seek to simply recreate this literature. However, while it is acknowledged that this shift of expectations towards those required of a more market-oriented business leader stemmed from the neoliberal

reforms of the late 1980's and 1990's, there is evidence that the essential characteristics of the resultant devolved management systems persist today, and continue to have an impact on the current experience of educational leadership (Ball, 2007; Billot, 2003; Bottery, 2006; Cranston, 2002; Gunter, 2008; Harold, 1999; Hodgen & Wylie, 2005; McInerney, 2003; Whitaker, 2003). It is indicative for example that Gunter (2008), in her appraisal of the current school workforce reform in England, points to the ongoing impact of managerialism in the attempt to affect a separation of the educational and non-educational elements of various school roles, and the subsequent hiring of non-teacher qualified staff for aspects of the work deemed able to "be done by others efficiently and cheaply" (p. 260). For those in leadership positions, this involves "the separation of leading professional work that someone with Qualified Teacher Status can do, from business strategy that a 'chief operating officer' can do" (p. 260). There is, she asserts, a continued significance of managerialism in the current educational environment of external demands and high levels of accountability "because through its neat and tidy, ever so logical and normal processes, it controls and eliminates human judgement; it teacher-proofs teaching and learning" (Gunter, 2008, p. 264). In this light then, it appears that managerialism continues to inform educational policy and consequently, impacts on the contextual framework, and importantly, current experience of educational leaders – the central concern of this study. It is the literature surrounding this current experience of leadership which is examined more closely in the following section.

The Current Experience of Educational Leaders

It is acknowledged at the outset of this section that the vast majority of existing literature documenting the experience and practice of school leaders has as its focus, the experience and practice of principals. This reflects, as Ribbins (2007) asserts, the dominance of an approach that has tended to be "fixated on the principal" (p. 13) and consequently, despite increasing interest (Bennett, Woods, Wise, & Newton, 2007; Cranston, 2007), relatively little is known about the experience of middle leaders, and those of non-school training institutions (Feist, 2008). This is a point which will be returned to later, but where such study was able to be located it has been incorporated here. While it is possible to frame the current experience of leadership in education in several ways, in relation to the present study it is of value to consider this experience

with respect to the dimensions of role change, leader stress and wellbeing, satisfaction and turnover.

Role change

There is widespread agreement in the literature that the current context of educational leadership has resulted in significant change to the role of leaders, and the experience of this change is the subject of a number of empirical studies both in New Zealand (Billot, 2003; Fiske & Ladd, 2000; Harold, 1999; Hodgen & Wylie, 2005) and around the world (Cranston, 2002; Fitzgerald & Gunter, 2006; McInerney, 2003). Whitaker (2003), in her overview of role changes experienced by principals in the USA, England, Ireland, Australia and New Zealand, offers five useful categories around which these changes converge. They are: local management, a tension between management and leadership, increased accountability, altered relationships with parents and community, and school choice.

Certainly, the notion of site-based or local management has been central to the education reform of the last two decades and it is of little surprise that this brings changes to the experience of leadership roles. Based on an eighteen month longitudinal study of Australian primary school principals, Cranston (2002) reports that principals find themselves to be increasingly engaged in "strategic management areas of the school to an extent not previously part of their remit. These include facilities management, budgeting and staff management" (p. 3). There is also some evidence that middle leaders face role changes associated with self management, although perhaps with varying emphases (Cranston, 2007; Douglas, 2007). In her study of 121 New Zealand deputy and assistant principals, Douglas (2007) identifies staff management and, often, responsibility for property and resources as key tasks, but finds only 2 respondents engaged in "strategic planning and charter development" (p. 8). This is further supported in Cranston's (2007) survey of 77 New Zealand deputy and assistant principals which, interestingly, reports a widespread desire for a greater involvement in strategic leadership. In the context of local school management, Cranston (2002, 2007) additionally highlights the experiencing of an increase in administrational demands placed both on principals and middle leaders, and the decrease of a 'hands-on' role in the curriculum and educational leadership. This finding is echoed elsewhere (Billot, 2003; Harold, 1999) and, indeed, Harold's (1999) study of the impact of self-

management on 57 New Zealand principals, teachers, and Boards of Trustees across seven schools in the Waikato region, finds that "the increased administrative workload was the most common perception of change for principals" (p. 4).

Secondly, the evidence from the literature points to an increasing sense, amongst educational leaders, of a tension or lack of alignment between the managerialist expectations of leader and the values which they profess to hold (Billot, 2003; Cranston, 2002; Harold, 1999; Hodgen & Wylie, 2005; McInerney, 2003; Whitaker, 2003). Billot (2003) in her collaborative study of the role and workload of Secondary School Principals in New Zealand and Queensland found there to be a "significant gulf between changes to principal's roles as initiated through educational reform, and the priorities held to be essential by principals" (p. 28). Based on 240 completed questionnaires, eight focus groups, and interviews with stakeholders, she concludes that there is "a mismatch between what principals actually do, and what is viewed as appropriate (by the system) or ideal (by them)" (p. 30). Harold (1999) confirms the "concern that the principals role had changed from professional leadership to a more managerial focus" (p. 4) while Hodgen and Wylie (2005), in their extensive quantitative analysis of some 1523 responses to the New Zealand Principals' Hauora-wellbeing Survey, report that:

> Principals were asked to indicate the proportion of their work that was management rather than leadership oriented. Only 24 percent indicated that there was at least an even balance, with 50 percent or less of their work oriented to management. We have taken 70 percent as the cut-off to indicate that a large portion of the principals' work was management not leadership oriented, and overall 57 percent of principals reported a percentage of 70 percent or more. (p. 27)

While it is acknowledged that the distinction between 'management' and 'leadership' may not be a simple binary (Gunter, 2008), that there has been a shifting balance and a tension experienced between elements perceived as falling into either of these headings, is all too clear. McInerney (2003) summarises this well in noting that "principals lamented how their work was being redefined in quite instrumental ways in line with their role as business managers, rather than as educational leaders" (p. 66). He goes on to exemplify this by describing the following interview:

> He [the principal] directed our attention to an over flowing pile of incoming correspondence on his desk. As he flipped through the bundle of papers, he commented on their overwhelming preoccupation with financial and

> administrative issues. Somewhat despairingly he exclaimed "Where's the educational stuff in it? Where's the thinking about curriculum … about teaching and learning? It's not there." (p. 66)

With regard to the experience of middle leaders, Cranston (2007) highlights a lack of role alignment reported by New Zealand deputy and assistant principals in relation to the desired balance of leadership and managerial responsibilities undertaken. While participants described a "real week dominated by operational matters, management and administration, and student and staffing issues" (p. 23), he found the two most significantly preferred aspects of their ideal week, "strategic leadership and education/curriculum leadership, were less evident" (p. 23). Interestingly, "the expectations placed on them by the principal" (p. 26) were perceived as a barrier to greater involvement in leadership roles. Feist (2008) furthermore, in her case study of six faculty leaders in New Zealand secondary schools, reports on a sense of tension between the experience of having a "powerful leadership mandate" (p. 6) within the context of subject area expertise, and yet finding the leadership role increasingly requiring of a refocusing away from this mandate and towards teaching and learning decisions made by "relying on the application of detailed rubrics, defined by external bodies" (p. 8). In addition she contends that as faculty heads are repositioned "between two layers of management, their key management tasks were re-centred on acting as a conduit for senior management, ensuring key policies and decisions were communicated to other managers" (Feist, 2008, p. 7). This experiencing of a hierarchical 'line management' element to the role is further confirmed by other studies. Bennett, Woods, Wise, and Newton (2007), in their review of empirical research into the nature of school middle leadership, observe that "tensions abound in the nature and expectations of middle leadership" (p. 462) and point to a resistance to recent policy emphases shifting the conceptualisation of the middle leader's role from 'leading professional' towards one of being part of a "hierarchically based quality assurance process" (p. 462). Subject leaders, Bennett et al. (2007) contend, are "being asked simultaneously to adopt a line-management relationship to their departmental colleagues and to undertake new responsibilities outside their traditional area" (p. 464). Moreover, it is further argued by some that this changed nature of the middle leader's role, involving delegation and highly managed practice, has led to the experiencing of what is referred to as 'contrived collegiality' (Bennett, Woods, Wise, & Newton, 2007; Feist, 2008).

Alongside these changes in leadership experience linked to school-based management and an increased managerial focus, studies indicate an altered emphasis on forms of accountability (Cranston, 2002; Fiske & Ladd, 2000; Harold, 1999; Whitaker, 2003). Whitaker (2003) points to evidence in the USA, England, Australia and New Zealand of the experiencing of broadened accountability demands in the areas curriculum implementation, student performance, and financial management. The introduction of standardised national curricula within a number of countries has added pressure to the accountability of leadership roles, particularly when the student outcomes under such standardised curricula are then used to rank and compare schools (Bottery, 2004; Fiske & Ladd, 2000; Thrupp, 2005; Whitaker, 2003). In the United Kingdom, emerging themes of concern, as articulated in the accounts of ten educational practitioners (Gunter et al., 2003), confirm the pressures being generated by restructured forms of accountability for student outcome and organisational efficiency. Such altered forms of accountability, these leaders assert (Gunter et al., 2003), often mean that "the emphasis is increasingly on performance at the expense of participative processes that are long term, based on trust, mutuality and meaning" (p. 309). Bottery (2004), furthermore, contends that the increased standardisation and control "actually results in people feeling distrusted and demoralised, for they know that they are constantly the objects of surveillance" (p. 87).

In an Australian setting, Cranston (2002) identifies the tension principals experience in "managing and responding to the system demands for accountability, planning processes, and documentation in a context, the rhetoric of which, suggested schools would operate with enhanced autonomy and responsiveness to local needs" (p. 7). This tension is further highlighted in New Zealand where Hodgen and Wylie (2005) found principals experiencing high or 'breaking point' levels of stress associated with "Ministry initiatives, paperwork and other system demands"(p. 33). Similarly, New Zealand deputy and assistant principals indicated reasons for the increased pressure of their roles as being "more demands from self government, greater accountability and record keeping" (Cranston, 2007, p. 20). It is worthy of note that the somewhat contentious nature of the role played in New Zealand by the Education Review Office in ensuring public accountability and compliance with these new demands, has sparked vigorous debate (Fiske & Ladd, 2000; Smith, 2002).

A further experience of role change for current educational leaders is in the area of altered relationships with parents and the community, including the impact of greater parental choice in the schools children can attend (Cranston, 2002; Fiske & Ladd, 2000; Harold, 1999; McInerney, 2003; Whitaker, 2003). With the thrust of educational reform across many western countries being on 'self-governance' of schools by local communities, this necessarily predicates a changing relationship between school leaders and their communities. In both Australia and New Zealand, evidence suggests principals find themselves more involved in working in with representative groups and committees to reach collaborative decisions, and having increased accountability to the local community (Cranston, 2002; Harold, 1999). In New Zealand this relationship is formalised through the appointing of a Board of Trustees from the local community who serve as 'school governors', and are charged with ensuring the school's operation is in accordance with National Administration Guidelines as defined as:

> Regulations that set out the way schools acknowledge national education priorities in the development of their charter and implementation of their programmes, and provide a framework for the way human, financial, and property resources are used in implementing those programmes. (Ministry of Education, 2007)

It is apparent that the relationship between the Principal, school staff, and the community via the Board of Trustees is of significant importance (Fiske & Ladd, 2000; Harold, 1999; Hodgen & Wylie, 2005). Also in a New Zealand context Douglas (2007) notes that a proportion of assistant and deputy principals include community liaison as part of their role, and reports that "many school leaders find connecting into the community and dealing with the media a challenge" (p. 9).

In addition Whitaker (2003) points out that "the notion of self-managing schools has necessitated commercial and entrepreneurial connections" (p. 44). In this regard, and in a climate of diminishing resources for public education, school leaders are increasingly involved in the establishing of school-business links, and in the seeking of new and altered avenues of gaining adequate resources (Fiske & Ladd, 2000; Lauder & Hughes, 1999; McInerney, 2003; Whitaker, 2003). As Fiske and Ladd (2000) found in the New Zealand context, "whatever the absolute definition of adequacy may be, the observation that schools are increasingly relying on locally generated funding provides further

support for the conclusion that funding from the government has become less adequate over time" (p. 155).

These changes in the entrepreneurial nature of the leadership role are also found to be linked to the impact of reforms which promote a greater freedom of school choice by parents (Fiske & Ladd, 2000; Harold, 1999; McInerney, 2003; Whitaker, 2003). In this environment of competition for students it is argued that "just as parents have seized upon their new right to select the schools their children attend, so individual schools have taken advantage of their self governing status to become more aggressive in marketing themselves" (Fiske & Ladd, 2000, p. 209). Consequently there is an impact on the current experience of leadership as "many principals are caught up in the business of marketing their school" (McInerney, 2003, p. 67).

Leader stress and wellbeing

A further dimension of the current experience of educational leadership is to be found in the links being made between the current context, and the experience of stress and wellbeing by those occupying leadership positions (Bottery, 2006; Brooking, 2007; Cranston, 2002; Gronn, 2003; Harold, 1999; Hodgen & Wylie, 2005; McInerney, 2003; Whitaker, 2003). These links largely centre around the experiencing of an intensification of workload, stress and isolation.

Gronn (2003), in his synthesis of the body of research addressing the question 'What do leaders do?', acknowledges that "leading and managing have always been experienced as intensely demanding forms of work" (p. 72). He notes, however, that post-reform intensification of workload has meant that "school leaders role demands have become numerically large and exceedingly complex, and the constraints they face extensive and imposing" (p. 84). Elsewhere, McInerney's (2003) interviews with Australian principals confirm the experience of workload intensification, while in New Zealand, Hodgen and Wylie's (2005) analysis of the Principals' Hauora-wellbeing Survey find that principals are largely working excessive hours (where excessive is defined as greater than 60 hours per week), and more tellingly, that 80 per cent of 1523 respondents agreed with the statement "there is so much work to do I never seem to get on top of it" (p. 28). Douglas (2007), furthermore, observes that the roles of assistant and deputy principals are also "multiple and complex" (p. 8), and reports a perception amongst mid-level leaders that "the expectations on a principal [are] high and that it [is] difficult for

principals to maintain a work/life balance because of the high workload, and the stress and pressure" (p. 20). It is worthy of note that in providing reasons for not seeking promotion, 73 per cent of deputy and assistant principals in Cranston's study (2007) highlighted "lifestyle decisions such as achieving work-family balance" (p. 20), 43 per cent commented that "the principal's role is too demanding" (p. 20), while 30 per cent indicated "a preference to remain closer to the teaching context" (p. 20).

Some commentators are referring to this intensification of role and degree of self-sacrifice inherent within a leaders work as 'greedy work' (Bottery, 2006; Gronn, 2003). As Gronn (2003) explains:

> Work becomes greedy when, as part of its intensification … the role space occupied by an incumbent expands. Role expansion increases to such an extent that an incumbent becomes responsible for an amount and quality of work output, and a depth of emotional and cognitive commitment and work engagement that might previously have been demanded of more than one person. (p. 150)

It is perhaps unsurprising, in such an environment where more is seemingly demanded than one person can give, that stress is widely acknowledged as a current factor in the wellbeing of educational leaders (Brooking, 2007; Cranston, 2007; Douglas, 2007; Harold, 1999; Hodgen & Wylie, 2005; Whitaker, 2003). In their extensive New Zealand study, Hodgen and Wylie (2005) found that overall, forty percent of principals reported experiencing high or extremely high levels of stress over the previous week, and interestingly, that "forty two percent of principals found that the range of their job, or work without a direct association with teaching, to be the sources of stress that stood out most for them" (p. 8). More particularly, the most frequently cited sources of stress were "the multi-tasking nature of the job", "Ministry initiatives, paperwork and other system demands", and "lack of time to focus on teaching and learning" (Hodgen & Wylie, 2005, p. 8). These findings support Billot's (2003) earlier study of 240 New Zealand principals showing seventy six percent of leaders experienced significant role overload with the "primary frustration aris[ing] from balancing what principals believe to be important strands of their leadership, with externally driven administration and management demands" (p. 30). Hodgen and Wylie (2005) go further to assert that these sources of stress "stem from the very nature of the principals role in self managing schools, which has more of a management weight than previously, and the positioning of the individual schools in relation to national systems" (p. 9). That stress is also a

feature of the experience of deputy and assistant principals is confirmed by Cranston (2007) in noting that of 77 New Zealand respondents, "over half rated the pressure in the current job as high" (p. 20) and about half indicated that the pressure had increased in the last 2 years.

In addition to high levels of stress, a number of studies point to the distance leaders may experience from staff and colleagues, and an accompanying sense of isolation (Cranston, 2002; Douglas, 2007; Harold, 1999; McInerney, 2003). In an Australian context, McInerney (2003) reports on a highlighted perception amongst school leaders that reform has brought "an approach to decision-making which is at odds with the language of partnership" (p. 65), and that good managerial leaders are expected to be tough and "have to stamp their authority on an organisation" (p. 64). There is, he finds, the experience of an increasing "separation of leadership from staff" (p. 65). This is echoed elsewhere by Harold (1999) who found, that after a decade of self-management in New Zealand, of "critical concern was lower levels of visibility and access to the principal by staff and students" (p. 3). Cranston (2002), furthermore, indicates that this sense of separation may also be evidenced in relationships amongst leaders in that "principals felt they were virtually alone in endeavouring to achieve the desired goals in practice in their schools" (p. 8). He notes that principals reported participating in "almost no professional development" (p. 8) and, over the period of an 18 month longitudinal study, that they had "little interaction in a developmental sense with other principals"(p. 8). While recent advocacy within the literature for moves toward more distributed forms of leadership (Gronn, 2003; Gunter, 2005; Hargreaves & Fink, 2006), and the establishment of leadership networks (the online site 'LeadSpace' in New Zealand for example) may to some extent assist in alleviating this sense of isolation, it is worthy of note that Douglas (2007), in her documenting of New Zealand assistant and deputy principals perceptions of principalship, still finds a recognition that "the personal cost of principalship [is] high – the role could be *lonely, frustrating, daunting, demanding*" (p. 21, emphasis original).

Leader satisfaction and turnover

In the current educational climate for leaders, a number of commentators, as earlier indicated, are expressing concern around the prevalence of leader turnover and the early exiting from positions of headship (Bottery, 2004; Brooking, 2007; Fullan, 2007;

Hargreaves & Fink, 2004; Stevenson, 2006). There is, in addition, a considerable and diverse body of study, which seeks to document and explore the notion of job satisfaction, and in many cases, to link this to turnover (Billot, 2003; Hodgen & Wylie, 2005; Murray, Murray, & Summar, 2000; Norton, 2002; Rosser, 2004; Sari, 2004).

Although no single definition of what constitutes job satisfaction appears to be universally agreed upon (Rosser, 2004; Sari, 2004), the definitions centre around the notion of an individual's feelings about a particular job. With respect to educational leadership, Rosser's (2004) outlining of job satisfaction as the emotional response to such issues as "salary, work environment, role clarity and responsibilities, task and workload issues, social and interpersonal relations with colleagues and superiors, department or unit climate, and autonomy and over-regulation" (p. 321), provides a useful understanding of the term.

Abundant references in the literature to studies of job satisfaction amongst educational leaders indicate that wide ranging research is being carried out, in countries as diverse as America (Murray, Murray, & Summar, 2000; Norton, 2002; Rosser, 2004), Turkey (Sari, 2004) and New Zealand (Billot, 2003; Hodgen & Wylie, 2005). One focus of such studies is to quantitatively investigate the variables impacting on job satisfaction through the employment of standardised instruments and inventories (Murray, Murray, & Summar, 2000; Rosser, 2004; Sari, 2004).

Sari (2004), in the study of 295 Turkish school headteachers and teachers, using the Job Satisfaction Scale and the Maslash Burnout Inventory, finds that "stress and job satisfaction are adversely related" (p. 302), and that the greater the number of years worked, the less the job satisfaction. Norton (2002), in his concern that "principal turnover has reached crisis proportions" (p. 51), cites a number of studies in suggesting that increasing workload demands, level of salary, time constraints, and the degree of parent and community support are all important factors in principals' experience of satisfaction with their roles. Furthermore, several other studies confirm the increasing sense of both role conflict, that is, the necessity to "handle duties that appear to be inconsistent or in conflict with their self perception of their role" (Murray, Murray, & Summar, 2000, p. 23), and role ambiguity, one's "uncertainty about the functional boundaries of his or her organisational role", (Murray, Murray, & Summar, 2000, p. 23) to be linked to a reduction in job satisfaction (Murray, Murray, & Summar, 2000;

Rosser, 2004; Sari, 2004). In apparent contrast to this, however, is the finding by Billot (2003) who, in her study of New Zealand principals, reported 85 percent of participants as being satisfied or very satisfied with their job role despite also acknowledging role conflict (85%) and role ambiguity (64%) to some, or a great extent. Hodgen and Wylie (2005), some two years later, also note that 75 per cent of New Zealand principals in their extensive study either agreed, or strongly agreed, with the statement "your job gives you great satisfaction" (p. 30) despite indicating high or breaking point levels of stress in some areas of their role. These contradictory findings perhaps point to the complexity of the human dimension of the experiencing of job satisfaction in education, and underscore the need for further qualitative research which may capture this leadership experience more fully.

A second focus of studies in the field of job satisfaction is the exploring of the widely acknowledged link between satisfaction, the construct of 'intent to leave', and turnover (Murray, Murray, & Summar, 2000; Rosser, 2004). Rosser (2004), in a nationwide survey of 4000 American midlevel leaders in higher education, found a significant correlation between satisfaction, morale and intent to leave, with higher levels of satisfaction leading to less likelihood of leaving. This finding is confirmed by Murray, Murray, and Summar's (2000) study of 250 Chief Academic Officers of American Community Colleges, although interestingly, despite reporting high levels of overall job satisfaction and low propensities to leave, 37 per cent of participants indicated that they would be likely to seek a new position in the next three to five years. This finding suggests that there may be factors other than professional job satisfaction, which impact on the decision to leave a leadership position and these bear further exploration. Indeed Rosser (2004) highlights the additional issues of geographic mobility, dual careers, and personal or family issues as worthy of attention.

The Relinquishment of Position

Embedded within the current experience of leadership outlined above, and indeed implicit in the turnover figures for school leaders, is the experience of a relinquishing of leadership position in order to move to an alternative. Interestingly, however, given the widely acknowledged concern regarding the so called 'crisis' in recruitment and retention, there is scant attention paid in the literature to the destinations of those who are leaving leadership, only relatively recent calls for a greater understanding of the

stages experienced throughout the leadership journey including relinquishment (Dimmock, 2003; Gronn, 2003; Ribbins, 2003; Stevenson, 2006), and a paucity of study of what is referred to by some as 'role exit' (Ebaugh, 1988).

Destinations following relinquishment

The pockets of data within existing literature which touch on the destinations of leaders who relinquish their positions, paint an interesting picture. In New Zealand for example, Brooking (2007) reports on a study carried out in the central North Island region which highlights concern that 50 per cent of principals are leaving within three years of being appointed, and alarmingly, almost 20 per cent within a year. In analysing the destinations of these exiting principals, it becomes apparent that over 50 per cent are seeking careers which do not include further principalship. In particular, it is found that for some 50 per cent of the exiting secondary school principals, the destinations were "retired including early retirement", "careers outside school sector" and "returned to the classroom" (Brooking, 2007, p. 14). For primary school principals, the proportion leaving for these same destinations was close to 60 per cent. Overall, some twelve per cent of all exiting principals in this region not leaving for new principalship positions indicated a return to classroom teaching as their destination.

Moreover, it is interesting to note that Douglas's (2007) data, with regard to the career plans of assistant principals and deputy principals in the same region, suggests that only 35 per cent of 121 respondents saw principalship as a future choice, and 26 per cent planned to "remain in schools in the same or another role" (p. 19) including returning to the classroom. Of course the phenomenon evidenced here may be argued to be a function of the region rather than an indication of the nature of leadership per se, but the point is that mid-level and upper level leaders *are* relinquishing their positions, and what is relevant to the present study is the statistical confirmation that some leaders *are* choosing to return to the classroom.

Emerging calls for an awareness of stages through leadership

While the focus of a large bulk of existing study associated with relinquishment appears to have been primarily on 'fixing' the problem, that is, getting more leaders in and making them stay, or if they do leave, making sure the succession is smooth (Fink & Brayman, 2004; Fullan, 2005; Hargreaves & Fink, 2004; Rhodes & Brundrett, 2006;

Stevenson, 2006), there are emerging calls for a greater awareness of the human experience of stages through leadership, including exit. As Stevenson (2006) contends:

> There is an imperative to better understand the career trajectories of teachers as they potentially move towards, into and through principalship. The need is to do more than explain the processes of leadership, rather, it is to begin to understand the experiences and motivations of teachers as they progress through their careers. (p. 409)

Ribbins (2003), furthermore, in his consideration of school leader careers and their development, argues for an increased emphasis on a humanistic approach to leadership study. "Too much thinking about leadership and too much of the practice of leadership development has overstressed the possibilities of the instrumental and underrated that of the humanistic", he asserts (p. 56). Such a humanistic approach would have "a deep concern for locating individuals within their social, cultural and historical settings" (Ribbins, 2003, p. 57) and at its worst, Ribbins (2003) suggests, the ignoring of the humanistic in leadership research contributes to a "quick-fix mentality in which the people who actually do the leading and those who are led seem to be of little interest" (p. 56).

Amidst the calls for a greater exploration of the human in the leadership experience, several commentators offer a consideration of stages through the leadership journey (Gronn, 1999; Ribbins, 2003; Stevenson, 2006). Stevenson (2006), for instance, emphasises the notion of career trajectory and argues for "a framework for developing a much richer understanding not only of beginning principalship, but of how that experience then develops as principals' careers unfold" (p. 416). In doing so, he asks the question "are principals forced to surrender their identity as teacher when they assume the role, and identity, of leader?" (p. 416) and an important corollary of this with regard to the present study might be "to what extent do those in leadership positions surrender the identity of leader, and regain the identity of teacher, when they make the transition out of position?" The richer understanding of the human experience of leaders invited by such questions requires significant investigation.

Other authors advance more structured models of the experience of the progression through leadership with Day and Bakioglu (1996) identifying the phases of Initiation, Development, Autonomy, and Disenchantment, and Gronn (1999) suggesting a model of stages of headship involving Formation, Accession, Incumbency, and Divestiture.

Ribbins (2003), furthermore, proposes a third pathway through leadership of Formation, Accession, Incumbency, and Moving on. Of particular relevance to the present study is the treatment of the final stages of the occupancy of a leadership position, and it is here that there is interesting disagreement.

Based on their study of 196 head teachers in England, Day and Bakioglu (1996), for instance, describe the final stage of incumbency as a time of experiencing a sense of stagnation and disenchantment, typified by "declining confidence, enthusiasm, and increasing personal fatigue" (p. 219). Leaders become aware of an increased "sense of mortality" (p. 219) they assert, and tend to 'ease off', ultimately leaving the position. Gronn (1999), however, seeks to avoid what is referred to as the "creeping negativism" (p. 41) implied in Day and Bakioglu's (1996) formulation. Instead, in the notion of 'divestiture', he argues for an understanding which can encompass a more positive experience of leaving a leadership position, and even the possibility of leaders leaving "at the height of their powers" (Gronn, 1999, p. 41). Additionally, Gronn (1999) begins to draw a distinction between voluntary departures, where leaders "deliberately make up their minds (usually by retirement or resignation) to relinquish appointments" (p. 40), and involuntary relinquishment. His contention, however, that "voluntary departures have the advantage of making for a relatively clean break" (p. 133) seems open to question in the context of leaders who voluntarily relinquish position yet remain in the same workplace, and is worthy of further investigation in this light. While Gronn (1999) suggests that the "immediate and longer-term effects of both forms of disengagement vary both qualitatively and quantitatively" (p. 132), these effects are only alluded to and are considered from the standpoint of the "well-being of the organisation" (p. 132) rather than the leaders themselves.

For Ribbins (2003) the term 'divestiture' is still too negative in connotation and not entirely successful in capturing, or representing, the experience of those relinquishing leadership positions. Drawing on almost 100 interviews with head teachers and principals in six countries, he proposes a final phase of leaving headship referred to as 'Moving On' in which there are two potential pathways: disenchantment leading to divesture, and enchantment leading to reinvention.

Such disagreement over the nature of the experience of the final stages and relinquishment of a leadership position, and the struggle to find terms to adequately

describe it appears to indicate several possibilities. Firstly, that there is a need for greater research in this area of the voluntary relinquishment of leadership position, and in particular, that this research focus on the experiential. Secondly, while the attention to phases throughout leadership including exit indicates a welcome interest in the human journey, perhaps a generalised stage model fails to recognise, and is unable to accommodate, the uniqueness of individual human experience.

Role exit theory

Outside of the realm of leadership studies, further effort to document the nature of the process of leaving one role for another may be found in the investigation of what Ebaugh (1988) has termed 'role exit'. This body of work, however, is extremely sparse. Role exit, as Ebaugh (1988) defines it is " the process of disengagement from a role that is central to ones self-identity and the re-establishment of an identity in a new role that takes into account one's ex-role" (p. 23). Focusing on the voluntary stepping out of role, and drawing on her study of 185 participants who had experienced a variety of role exits as evidenced by the inclusion of ex-nuns, former semi-professionals, divorcees, ex-alcoholics, ex-prostitutes and transsexuals, Ebaugh (1988) comes to the conclusion that "a definite pattern exist[s] with regard to the process individuals experienced in leaving roles" (p. 25). This pattern she describes as a sociologically unique process involving the stages of First doubts, Seeking alternatives, The turning point, and Creating the Ex-Role. What is crucial to Ebaugh's (1988) conception is that "being an 'ex' is a unique role experience because identity as an ex rests not on one's current role, but on who one was in the past" (p. 180). If this is true, it would be of particular interest with regard to work role exits to capture the experience of those who leave a position but remain in the same work environment where the evidence of the previous role is abundant on a daily basis.

Only a small handful of further studies of voluntary role exit were able to be located, and of these, even fewer involved educational settings (Freese, 2003; Harris & Prentice, 2004; Johnson, 2003). As Freese (2003) laments, "existing research regarding role exit is not only very limited, but it is fragmented by the inclusion of both voluntary and involuntary exiters, or a focus on a particular gender" (p. 310). Such educational role exit studies as were able to be located often concerned themselves with the causes or stages of exit, with some focusing solely on the process of retirement (Harris &

Prentice, 2004), while others included consideration of mid-career exits (Freese, 2003; Johnson, 2003).

Freese (2003), in seeking to uncover the factors influencing 22 Wisconsin Public school superintendents to relinquish their position "voluntarily and prematurely" (p. 7), finds those most frequently identified as contributing to voluntary role exit to be: compatibility (91%), efficacy (82%), workload (68%), stress (64%), family/spousal (59%) and life balance (50%). He furthermore notes that "exiters in this study revealed that voluntary exit did not result from a single critical incident or factor, but was indeed the result of a combination of factors generally considered in a gradual, deliberate and explorative manner" (p. 304). In the making of the actual decision to exit, Freese (2003) indicates the emergence of recruitment or opportunity as being of importance, and this finding is confirmed elsewhere in the observation that "without the interface of a new opportunity the exits likely would not have occurred" (Johnson, 2003, p. 255).

Johnson (2003), in her study focusing on the application of Ebaugh's (1988) model to the voluntary role exit of twelve American school principals, contends that:

> For the many individuals who experience a role exit by leaving a professional occupation or career, the process challenges that individuals identity and sense of self, and can present significant challenges to one's sense of well being and sense of satisfaction with life. (p. 132)

She goes further to classify her participants as satisfied and unsatisfied exiters, and finds that while Ebaugh's model served reasonably well to describe the process followed by the dissatisfied exiters, this was not the case with the satisfied. Indeed, Johnson (2003) reports that, with the exception of the final stage of 'creating the ex-role', the satisfied exiters did not tend to describe an exit process which followed closely Ebaugh's model. It is worth of note however, that in this final stage, Johnson's (2003) study finds that the participants "sought to create consistency by ensuring that the new opportunity provided a good match with their identity and concept of self" (p. 235), and in particular, "that they would be able to help children in their new roles" (p. 235).

This raises an interesting commonality across these studies whereby participants reported feeling "a sense of mission"(Harris & Prentice, 2004, p. 739) in their roles as teachers, and that of those who were exiting from leadership positions but not retiring, "many felt that they were still helping children, perhaps to an even greater extent than

they had done" (Johnson, 2003, p. 251) in their former role. There is the suggestion here that this importance placed on helping others, and the belief that they were making a difference in people's lives, may be of significance in the human experience of the relinquishing of an educational leadership position, and perhaps in the maintenance, or reconstruction, of identity following exit. This bears further investigation.

It is also of value to note that both Johnson's (2003) and Freese's (2003) studies allude to the existence of educational leaders who exit their positions in favour of something other than promotion, retirement or leaving education. Of the destinations pursued following exit from the superintendent role, Freese (2003) reports 27 percent of exiters remained in public education and assumed "positions of lesser responsibility i.e. assistant superintendent, central office director or principal" (p. 300). While he points to a sense of the realignment of values, and a reconnecting with "what was most important about schools" (p. 62) amongst this group, there is no significant treatment offered of the post-exit experience to a 'lesser' position. Johnson (2003), in her study, observes that of twelve exiting principals, "two created their own alternatives by requesting a return to the classroom" (Johnson, 2003, p. 255). Although it is not specifically made clear, presumably these two principals making the shift from principal to teacher were doing so within the same school, and if this is the case, it would be informative to consider their post-exit experience in more detail. It is highlighted that none of the studies referred to above specifically address the experience of leaders who voluntarily exit their position yet choose to remain as teachers within the *same* educational organisation, and in fact there is no evidence in the literature of any having been carried out.

It is worthy of note that Ebaugh's (1988) conceptualising of role exit has, however, received critical attention from some quarters (Wacquant, 1990). Wacquant (1990), for instance, claims that role theory itself inherently fails to account for social construction, and indeed, that at best it simply "takes the character and definition of roles as given and fixed" (p. 400). He furthermore specifically casts doubt on Ebaugh's contention that "role exit is a process that is generalizable to all exits" (Ebaugh, 1988, p. 206), and points to examples of forced exit, and the assumption "that role exit is a process homogenous across institutional areas and unaffected by the cultural frames of interpretations specific to each" (Wacquant, 1990, p. 401), as areas requiring of additional exploration. Of particular interest in relation to the present study is his noting

that those located in cultures of meritocratic individualism, for example, managers and professionals, are "not only considerably *more embedded at the social-relational* level than Ebaugh allows; they also have *an inescapable cultural dimension* which is entirely missing" (Wacquant, 1990, p. 401, emphasis original) in her evaluation of role exit. Wacquant (1990) concludes with the suggestion that to fully appreciate the process of role exit it is necessary to go beyond role exit theory, and to "adopt a biographical-cum-historical perspective" (p. 402) which allows for a focus on "the more or less successful encounter between positions and dispositions" (p. 401). A study with an emphasis on human experience and 'life-story' may serve to address this point.

The Gap

In the context of what has been referred to as a 'crisis' in the recruitment and retention of educational leaders, there is a remarkable lack of attention paid to the destinations and experiences of leaders who leave. Instead the focus of the vast majority of existing study associated with leadership turnover appears to have been primarily on 'fixing' the problem, that is, getting more leaders in, making them stay, or if they do leave, making sure the succession is smooth (Fink & Brayman, 2004; Fullan, 2005; Hargreaves & Fink, 2004; Rhodes & Brundrett, 2006; Stevenson, 2006). These studies, in their pragmatic organisational leanings, tend to under-represent the place of the personal in leadership, and take little interest in the experience of leaders once they have relinquished their leadership position. Moreover, in a broad sense, the locus of research interest in educational leadership literature has predominantly been the principals of schools, and in this light, further study exploring the experience of mid-level leaders, and leaders of other institutions such as Private Training Establishments, would be fruitful.

Whilst there are emerging calls for a greater awareness and understanding of the human experience throughout the leadership journey, including relinquishment (Dimmock, 2003; Gronn, 2003; Ribbins, 2003; Stevenson, 2006), these calls are largely located within the context of the investigation of career stage models. That there is, as yet, a lack of consensus amongst these studies as to the nature of the final stages of occupying a leadership position, points both to the need for the gathering of further rich, experientially focused data in this area, and to the potential inadequacy of such models where perhaps 'one stage does not fit all'. Taking a more sociological perspective, the

advancement of role theory and research around the role exit process may begin to offer a framework for understandings of what it might be like for leaders during, and importantly, after the relinquishing of a position. However, these studies are sparse indeed and those particularly concerned with voluntary role exit in educational settings, even sparser. Although there is peripheral allusion in such research to those who exit from a leadership position yet remain within the same workplace, no studies specifically capturing this unique experience were located. It is also noted that role theory itself is accused by some of being unable to take cognisance of the situated and cultural dimension of role exit – a dimension which appears to be particularly relevant to exiting leaders (Wacquant, 1990) – and that a stronger biographical approach may be more encompassing.

Specifically, and perhaps unsurprisingly given the educative priorities frequently found by studies to be highly valued by leaders themselves (Billot, 2003; Cranston, 2002; H. Gunter et al., 2003; Hodgen & Wylie, 2005; Johnson, 2003), both statistical and anecdotal evidence shows that educational leaders are choosing to relinquish position yet remain in teaching within the same school or workplace (Brooking, 2007; Harris & Prentice, 2004; Johnson, 2003). The unique experience of this shift, however, and even the terminology to adequately describe it, appears entirely absent in research literature. Given the under-studied nature of this phenomenon, the need for an exploratory, descriptive and experientially focused investigation is apparent, and hence, the present study seeks to address this need through the qualitative exploration of the central research question: "What is the lived experience of the voluntary relinquishing of the position of leader, yet choosing to remain within the same educational workplace?"

Summary

This chapter has drawn attention to the depth of concern in relation to recruitment and retention in educational leadership, and outlined the global and local context of such concern. The current realities of educational leaders, as evidenced in the literature, with regard to role change, stress and wellbeing, satisfaction, and turnover have been presented. Despite emerging calls for greater understanding of the human experience of leadership, including the relinquishment of position, this chapter has shown that there is paucity of study addressing the notion of role exit, and in particular, a complete absence of research around the experience of educational leaders who step aside yet remain

within the same workplace. Thus, the central research question of the present study has been identified and the following chapter describes the methodology employed in addressing this question.

Chapter Three: Methodology

In this chapter the theoretical and methodological underpinnings to the present study are outlined. Specific details of the research design and procedures for data collection and analysis are explicated, and justified, with relation to the central research question: "What is the lived experience of the voluntary relinquishing of a position of leadership yet remaining within the same educational workplace?" The process of self-interview, as a means of orienting oneself to the phenomenon under study, is described and the researcher pre-understandings are uncovered. The chapter closes with an evaluation of the trustworthiness of the investigative procedures and a consideration of ethical issues relevant to this study.

The Theoretical Framework

This study, in its intent to explore the lived experience of educational leaders who have stepped aside from the position of leader, but continued to remain in the same workplace, was located within a constructivist research paradigm. Thus, the assumption of a relativist ontological position was made and, consequently, it is asserted that the realities of the lived experiences of participants within this study are essentially local and specific co-constructions of the players and their context (Guba & Lincoln, 2005). The coming to an understanding of what is 'real' is thereby a process of meaning-making, and it is acknowledged that these meanings will be "varied and multiple" (Creswell, 2007, p. 20). Guba and Lincoln (2005) contend that "a goodly portion of social phenomena consist of the meaning-making activities of groups and individuals around those phenomena" (p. 197), and indeed it is the meaning-making around the phenomenon of the stepping aside from leadership which this study seeks to capture.

Epistemologically, the assumption was made that the relationship between myself, as inquirer, and the known was necessarily a subjective and interpretive one, and indeed that "the knower and the known interact and shape one another" (Denzin & Lincoln, 2005, p. 22). In particular, it was recognised that the researcher was engaged in a process of making sense of the meanings others have about the world, and that the 'sense made', that is, the interpretations arrived at, were therefore "shaped by [the researcher's] own experiences and background" (Creswell, 2007, p. 21). Thus, it was

vitally important that I, as the inquirer, 'positioned' myself within the research in order to acknowledge the influence of background on subsequent interpretation. The specific positioning of the researcher within the current study has been earlier described in Chapter One.

Given the theoretical underpinning of constructivism described above, there was an emphasis in this study on "seeing the situation through the eyes of the participants" (Cohen, Manion, & Morrison, 2003, p. 183), and a seeking of "the complexity of views" (Creswell, 2007, p. 20). Thus, in exploring the lived experience of the voluntary relinquishing of position yet remaining within the same educational workplace, there was a close linking of the theoretical position to the decisions made regarding methodology and research design. In this regard, and in order to facilitate the capturing of the richness of human lived experience within multiple and constructed realities, the methodology guiding this study was necessarily qualitative. The research design, along with the methods engaged for the purpose of data collection and analysis, are outlined in the subsequent sections.

Research Design

Merriam (1998) contends that "a case study design is employed to gain an in-depth understanding of the situation and meaning for those involved (p. 19). It is clear from the central research question informing the present study, that this research concerns itself with in-depth understanding, and the meanings of lived experience, and hence, that case study offers a suitable research design to accommodate these concerns.

Elsewhere, case study is more specifically defined as an "in-depth exploration of a bounded system based on extensive data collection" (Creswell, 2005, p. 439) where "the phenomenon under study is not readily distinguishable from its context" (Yin, 1993, p. 3). It is pointed out that educational leaders of schools, programmes or departments are inherently situated in, and interacting with, a particular bounded context, and that the phenomenon of interest in this study, that is, the experience of stepping out of leadership yet remaining in the workplace, is located within this same context. Thus, it was in order to facilitate the in-depth exploration of this phenomenon within its context that case study, and in particular, descriptive multiple case study (Merriam, 1998), was selected as the research design for this investigation.

Descriptive multiple case study

While the literature suggests a number of varying classifications of case study, several authors concur around the use of the term 'descriptive' case study (Merriam, 1998; Yin, 1993). Yin (1993) for instance, defines a descriptive case study as one aiming for "a complete description of a phenomenon within its context" (p. 5), while Merriam (1998) draws attention to the suggestion that descriptive case studies are not guided by existing hypothesised generalisations, or seeking to formulate theory, but rather "are useful in presenting basic information about areas of education where little research has been done" (1998, p. 38). Given the previously highlighted paucity of literature around the experience of stepping out of leadership position yet remaining in the same workplace, there is a need for "rich, thick description" (Merriam, 1998, p. 38), and it is for this very reason that a descriptive design was chosen. There is then, within this study, a deliberate seeking of the essence of this experience and an acknowledgement that "whatever the area of inquiry, basic description comes before hypothesizing or theory testing" (Merriam, 1998, p. 38).

In addition to being descriptive, the case study design employed in this investigation was necessarily one allowing for the examination of multiple cases. As Stake (2006) points out, every case "has an inside and an outside" (p. 3), and there is widespread agreement in the literature on the importance of defining what is, and what is not, the case to be studied (Bogdan & Biklen, 2007; Creswell, 2007; Merriam, 1998; Stake, 2006; Yin, 1993). Within this multiple case study the individual case, or 'unit of analysis' (Yin, 1993), was defined to be that of the bounded system of the educational leader who has voluntarily stepped aside from position, and the post-primary sector educational context within which this decision was made, and the person has continued to work. It is important to note in the 'fencing in' (Merriam, 1998) of the case, that there is a stipulation of the *voluntary* relinquishment of the title of leadership, and that this study was not seeking to explore the impact of restructuring or other involuntary title-changing processes on leaders. As what is essential in this study is the foregrounding of the lived experience of the leader within a given educational context, it is deemed unnecessary at this point to specify the sector of the context more precisely than 'post-primary', however more specific details of the individual case contexts are provided in the following section. This definition of the individual case is essential as it provides

boundaries for the study, helps to determine what the description includes or excludes, and has an impact on the potential relevance of the study for readers (Yin, 1993).

It is important to note that multiple cases were examined within this study, not in an attempt to provide for the traditional notion of generalisability, but rather to allow for a fuller and richer description of this previously unexplored phenomenon to be constructed. Stake (2006), although his language of the "quintain" – the collective target of the phenomenon to be studied – was not adopted in this study, perhaps most closely expresses the intent of the multiple case design as it was used in this investigation:

> Multicase research starts with the quintain. To understand it better we study some of its single cases – its sites or its manifestations. But it is the quintain we seek to understand. We study what is similar and different about the cases in order to understand the quintain better. (p. 6)

The Participants

As has been previously defined, each individual case within this multiple case study consisted of a participant, that is, a leader who had stepped aside, and their specific contextual setting. This section describes the process of the recruiting and selecting of participants, and provides an overview of the broad contextual parameters from within which the participants were drawn.

Recruitment and selection

The participants for this multiple case study were selected on the basis of having been leaders in post-primary educational settings located within the region of greater Auckland, New Zealand, and who had voluntarily relinquished the position of leader yet remained working in the same educational workplace.

The first two cases were selected, in consultation with supervisors, from the researcher's own professional networks, with a total of eight participants being subsequently recruited and selected using a snowball sampling technique (Cohen, Manion, & Morrison, 2003). While it is acknowledged that this selection technique of "using the first interviewee to suggest or recommend other interviewees" (Cohen, Manion, & Morrison, 2003, p. 144) is in no sense random, or necessarily representative, it did result in cases being selected from increasingly wider circles than the researcher's own contacts, adding to the 'trustworthiness' (Bassey, 2002) of the study. In addition, given that this study was concerned with the collecting of qualitative data and specifically

intended to produce "a rich and holistic account of a phenomenon" (Merriam, 1998, p. 41) rather than externally valid generalisations, the purposive sampling of the snowball selection technique was appropriate.

Potential participants were provided with an Information Sheet detailing in clear simple language the names of the people responsible for the project, and its objectives and procedures, before being invited to participate. A copy of this Participant Information Sheet may be found in Appendix A. It was made clear in the recruitment process that any participation was voluntary, and that participants would have a period of time, without inducement or coercion, in which to consider the invitation. Those who chose to accept the invitation to participate were required to sign a consent form, a copy of which is located in Appendix B.

It is noted that "there is not a set number of cases" (Creswell, 2007) to be included in a multiple case study, and in this investigation the final number of cases studied, namely eight, was determined by the depth of information able to be gathered in each case, and the degree to which this made possible the 'thick' description (Merriam, 1998) of the phenomenon under study.

Participant context

The participants in the present study were drawn from the educational settings of Private Training Establishments offering certificate, diploma and degree courses, and New Zealand State Secondary Schools. The length of tenure of the leadership position resigned from ranged from sixteen months to twenty years, and leadership titles included those of Academic Dean, Director of Studies, Head of Department, and Assistant Principal. The date of stepping aside from the leadership position ranged from eighteen months to ten years ago, at the time of writing. Further specific contextual details relevant to each case, and the phenomenon under study, are included in the crafted stories of each participant found in the first of the findings chapters.

Data Collection

Bassey (2002), in elaborating on his prescriptive definition of educational case study asserts:

> Case study means that the researcher needs to collect sufficient data to allow him/her to explore features, create interpretations and test for

> trustworthiness. But 'sufficient' is a two-edged word meaning 'not too little, not too much'. There is no point in the researcher collecting more data than can be handled successfully in the time available – and that entails exercising considerable insight and judgement. (p. 110)

Sufficient data in this study were collected through face-to face interview and the taking of field notes during the interview process. Reflective journaling both immediately subsequent to the interview, capturing the researcher's first impressions, and in an ongoing process was also carried out and it is noted that in "record[ing] the progression of our experiences and self awareness … our experiences are data drawn into the research process" (Koch, 1999, p. 26).

Unstructured interviews

The main source of primary data in this study were the participant leader/teachers themselves, with data being gathered through the process of a 45 to 60 minute, face-to-face, unstructured interview. Face-to-face interview was selected as the main method of data collection due to the focus of the central research question on capturing lived experience, and as van Manen (1990) notes, it is often "easier to talk than write about personal experience because writing forces the person into a more reflective attitude, which may make it more difficult to stay close to an experience as it is lived" (p. 67). Unstructured interviews, in particular, were employed as they "begin with a single open-ended question or broad theme, and the respondent plays a big(ger) part in determining the direction" of the interview (Mutch, 2005, p. 126). Cohen, Manion, & Morrison (2003) contend that "the more one wishes to acquire unique, non-standardised, personalised information about how individuals view the world, the more one veers towards qualitative, open-ended unstructured interviewing" (p. 270). Thus, an unstructured interview format was chosen for its 'fitness for purpose' as participants were being invited to describe their own personal experience of the stepping out of the position of leader yet remaining within the workplace. In acknowledging the notion that "respondents define the world in unique ways" (Merriam, 1998, p. 74), it was deemed inappropriate to seek to capture the uniqueness of this lived experience through a pre-defined, and standardised, set of questions.

The interviews in this investigation were carried out over a four-month period between January 30th, 2008 and June 8th, 2008 in a variety of venues honouring the participant's preferences. All interviews were recorded, and field notes taken. The indicative

interview length of 45 to 60 minutes was chosen as a realistic and appropriate acknowledgement both of the time required to adequately gather rich qualitative data, and the sacrifice the participant was making of their own time in being willing to be interviewed. Actual recorded interview lengths in this study ranged from 33 minutes to 51 minutes.

Transcript management

Immediately following each interview the recording was sent for transcription to a professional transcriber who had been required to sign a confidentiality agreement. A copy of the confidentiality agreement may be found in Appendix C. The transcriber was instructed to use question marks to indicate any portion of the recording which was audibly unclear, or the meaning uncertain, and the entire document, on its being received, was reviewed in conjunction with the audio file to resolve any of these issues. Verbatim transcripts of interviews were then returned by postal mail to the respective participants within 2 weeks of the interview date for "respondent validation" (Bryman, 2004, p. 274). In seeking corroboration or otherwise of the transcript's accuracy in reflecting the interview, the participants were explicitly provided with the opportunity to make amendments to the transcript, or to withdraw any information that they were subsequently uncomfortable with. Upon receiving the transcript back from the participant, the entire document was once again reviewed; any requested amendments were made, the names of people, schools or programme areas removed, and pseudonyms applied before analysis was formally commenced.

Data Analysis

As the central concern of this study is the lived experience of stepping out of leadership position yet remaining in the same workplace, and as this phenomenon appears currently unexplored and unreported on in research literature, it was seen as incumbent on researchers to initially provide a 'rich, thick description' of the phenomenon (Merriam, 1998), and in doing so to explore the meaning structures (van Manen, 1990) embedded within the phenomenon. With this intent, the exploration of lived experience within the present study was strengthened by combining the appropriateness of the descriptive multiple case study design with the taking of a hermeneutic stance to the analysing of the data collected. As outlined below, in what perhaps might be traditionally regarded as the within-case analysis, stories of participant experience were

crafted from the verified transcripts, and hermeneutically intuited interpretations offered. In the cross-case analysis shared meanings, or essential 'themes' (van Manen, 1990), of the experience were uncovered.

The tradition of hermeneutic interpretation

Simply stated, "hermeneutics is the theory and practice of interpretation" (van Manen, 1990, p. 179), and perhaps more particularly, the "laying out of one's comprehension of a text, [where] text is not only the written word and/or our observations of the world but the stories told to us" (Koch, 1999, p. 26). In the present study it was the stories, as captured in interview transcript, which provided the text for interpretation. It is suggested that there is no single or prescribed 'method' to hermeneutics (Gadamer, 1995; van Manen, 1997), and indeed that "hermeneutics has traditionally understood itself as an art" (Gadamer, 1995, p. 265), but that it is important to show the reader the way in which the interpretation is made (Giles, 2008; Koch, 1999). To this end it is acknowledged that in coming to an interpretation, the interpreter brings with them a set of pre-understandings of the phenomenon based on values, experience and background (Gadamer, 1995; Koch, 1999; van Manen, 1997). Gadamer (1995) refers to this fore-structure of the researcher's pre-understandings as 'prejudices' and, within this study, it is held that these prejudices are unable to be put to one side, or 'bracketed-out', from the interpretive act. Rather, as Koch (1999) points out, it is suggested that "gaining an awareness of our prejudices allows the interpreter to take account of these in an effort to hear what the text says to us" (p. 32). This is a point which will be more fully addressed in the following section.

The 'orienting' self-interview

Prior to the commencement of participant interviews in this study a self-interview was carried out. The purpose of this self-interview was threefold: to orient oneself to the phenomenon under study (van Manen, 1990), to sensitise the researcher to the process of the providing of description and the conducting of analysis of lived experience, and to identify the researchers pre-understandings or prejudice (Gadamer, 1995) brought to the interpretive act.

As earlier described in the positioning of myself as the researcher in Chapter One, I have had the experience both of choosing not to accept a leadership position yet remaining within the same workplace, and of voluntarily relinquishing a leadership

position in order to return to teaching in another workplace. These experiences are valuable in orienting myself to the phenomenon around which this study centres, however, it is not enough, van Manen (1990) contends, to "simply recall experiences I or others may have had" (p. 41). Rather, he suggests, in orienting to a phenomenon the experience must be recalled "in such a way that the essential aspects, the meaning structures of this experience as lived through, are brought back as it were, and in such a way that we recognise this description *as a possible experience*, which means *as a possible interpretation* of that experience" (van Manen, 1990, p. 41, emphasis original). Self interview, therefore, was conducted with the intent to 'bring back' the meaning structures of my experience in an effort to orient to the phenomenon.

In consultation with supervisors, a textual representation of my experience was constructed, and this served not only to provide a text for subsequent analysis, but also as a means of becoming more sensitive to what in fact I was inviting participants to do (Giles, 2008). As has been pointed out, "before we ask others to furnish us with a lived-experience description about a phenomenon that we wish to examine, we might do well to try such descriptions ourselves first" (van Manen, 1990, p. 64). The describing of my own lived experience alerted me to the possible ebb and flow of such a description, and began to indicate some of the emotions which might perhaps be evoked in the retelling of experience.

An analysis of the text of my lived experience was carried out in consultation with supervisors, using the hermeneutic approach outlined below and adopted for use with all subsequent participant transcripts. This allowed me to become more attuned to the 'thoughtfulness' (van Manen, 1990) required in the seeking of meaning structures and the arriving at an interpretation of lived experience. In the isolating of themes within my particular lived experience there is an uncovering of the researcher's prejudice (Gadamer, 1995) around this phenomenon. This is significant in being interpretively sensitive to a text, as Gadamer (1995) explains:

> Hermeneutics involves neither 'neutrality' with respect to content nor the extinction of one's self, but the foregrounding and appropriation of one's own fore-meanings and prejudices. The important thing is to be aware of one's own bias, so that the text can present itself in all its otherness and thus assert its own truth against ones own fore-meanings. (p. 269)

Based on the hermeneutic interpretation of text generated through self-interview, the researcher's bias in approaching the phenomenon under study is explicitly acknowledged here as including the following:

1. That leadership (and hence the stepping out of leadership) is inseparably bound with relationship.

2. That educational leadership can be experienced as a conflict between 'business' objectives and 'educational' objectives.

3. That the stepping out of leadership yet remaining in the same workplace involves a necessary, and sometimes awkward, renegotiating of 'place'.

4. That leadership can be experienced as a coming to the awareness of a sense of personal cost to the leader.

Crafted stories

Formal data analysis commenced with the crafting of 'stories' capturing the essence of each individual's experience. These stories were crafted from interview transcripts which had been read, amended and verified by the participant. Having received the verified transcript back from the participant, any identifying names of people, departments or organisations were removed and replaced with generic descriptors. Where this has occurred, these generic descriptors are signalled by being written in italic script within square brackets.

Next, in the hermeneutic seeking of meaning, each text was read several times with annotations being made and key phrases highlighted. This process was informed by van Manen's (1990) 'selective reading approach' where there is a dwelling with the text and the question is asked "what statement(s) or phrase(s) seem particularly essential or revealing about the phenomenon or experience being described?" (p. 93). These highlighted statements and phrases were then selected as verbatim quotes to be used in the crafting of a story of the lived experience, in the participant's own language. The crafting process involved a re-ordering of quotes to facilitate logical coherence yet hold meaning, the inclusion of sufficient relevant contextual detail to situate the experience, and some minimal grammatical changes, for example in verb tense, to allow the story to read comfortably. An example of this crafting process including verified transcript

material, selected quotes, and an exemplar from the crafted story is provided in Appendix D.

The crafting and presenting of stories using the language of the participants serves several purposes. Firstly, it provides for an honouring of the participants' voices within the study, and as the study deals with the description of an unexplored phenomenon this is deemed to be particularly vital. Secondly, it acknowledges the previously mentioned importance of showing how an interpretation is come to (Giles, 2008; Koch, 1999). In presenting crafted stories the transparency of the interpretative process is enhanced and the reader invited to embark on their own interpretive journey. Thirdly, by maintaining the participants own language within the crafted story, embedded meaning contained within the participants word choice and placement is safeguarded (van Manen, 1997) and carried forward in the interpretive process.

Individual interpretations

Following the crafting of the story of lived experience, attention was turned towards interpreting or the seeking of meaning within the text. Some describe this interpretive process of searching for understanding as a conversation where "meaning emerges as the text and inquirer engage in a dialogue, a hermeneutic conversation" (Koch, 1999, p. 26). Certainly significant dialogue with the transcript material was engaged in within this study, and particular attention was paid to the contribution of the parts, and the integrity of the whole, as expressed within the description of lived experience. This notion of 'hermeneutic circling' in the search for meaning is important, and indeed Gadamer (1995) asserts "fundamentally, understanding is always a movement in this kind of circle, which is why the repeated return from the whole to the parts, and vice versa, is essential" (p. 190). The interpretive comments arrived at in this study, then, centre around the essence of experience as embodied in the crafted stories, while drawing on the fullness of the complete transcripts. As highlighted earlier, coming to a hermeneutic interpretation is not to be regarded as a simple 'rule-bound' procedure (Gadamer, 1995), but rather, may be thought of "more accurately [as] a process of insightful invention, discovery or disclosure" (van Manen, 1990, p. 79).

As meaning began to reveal itself in each individual text, detailed journaling was carried out by the researcher in order to "record the progression of experiences and self awareness" (Koch, 1999, p. 26), and the process of writing, and rewriting, of possible

interpretations was begun. van Manen (1990) makes it clear that to be engaged in the seeking of meaning of human experience is to be "engaged in the reflective activity of textual labour" (p. 78). Interpretations of each individual experience of stepping out of leadership were drafted, and van Manen's (1990) contention that "to be able to do justice to the fullness and ambiguity of the experience of the lifeworld, writing may turn into a complex process of rewriting: re-thinking, re-flecting, [and] re-cognizing" (p. 131) proved to be the case. Each interpretation underwent several drafts aimed at getting closer to the meaning of the individual lived experience, but are yet acknowledged as being 'provisional' and "continually ready to alter [their] construction when better insights come along" (Koch, 1999, p. 33). These individual interpretations are offered immediately subsequent to the crafted story of each participant in Chapter Four, the first of the findings chapters.

Shared themes

Finally, in hermeneutically seeking the meaning of the experience of stepping out of leadership yet remaining in the workplace, there was a consideration of the shared 'themes' revealed across the range of individual experiences. The term 'theme' is used in this study in the sense that van Manen (1990) employs it, that is to say, not as some formulation resulting from a mechanistic coding exercise, but rather as "the structure[s] of experience" (p. 79) or "the form of capturing the phenomenon one tries to understand" (p. 87). In this stage of the data analysis the commonalities between the interpretations of the individual experiential accounts were discerned in order to better understand the phenomenon. This consideration of both the unique and the shared, reflects again the hermeneutic circling described by Gadamer (1995) where "the 'method' of understanding [is] concerned equally with what is common, by comparison, and what is unique, by intuition" (p. 190).

As these patterns of potential commonality began to be identified, there was again a process of writing and rewriting which took place, in an attempt to make sense of, and to articulate in the form of a theme, the essential meaning of the phenomenon. It is acknowledged however that "a so-called thematic phrase does not do justice to the fullness of the life of a phenomenon. A thematic phrase only serves to point at, or allude to, or to hint at, an aspect of the phenomenon" (van Manen, 1990, p. 92). These shared themes pointing to the essential aspects of the phenomenon of voluntarily stepping aside

from leadership yet remaining in the workplace, are presented in Chapter Five, the second of the findings chapters.

Trustworthiness

Although the term 'validity', as used in its traditional sense, is acknowledged as having limited meaning for many qualitative researchers (Creswell, 2007), there is still however the pressing concern that findings arrived at, regardless of underlying paradigm, must be sufficiently "authentic, isomorphic to some reality, trustworthy, [or] related to the way others construct their social worlds" (Guba & Lincoln, 2005, p. 205) to be trusted. Given that this investigation has sought to capture the lived experiences of educational leaders, and was underpinned by a constructivist paradigm, it is inherently acknowledged that there is no single correct account of social reality, but in fact, there may be more than one (Guba & Lincoln, 2005). The emphasis therefore, of this descriptive multiple case study was on creating "plausible interpretations" (Bassey, 2002, p. 109) which then may be tested for "authenticity" or "trustworthiness" (Guba & Lincoln, 2005, p. 207).

In considering the application of Bassey's (2002) 'Tests of trustworthiness' for case study research to this investigation, it can be seen that this study demonstrates trustworthiness through "prolonged engagement with data sources" (p. 120), and in the provision for information gathered to be "adequately checked with its sources" (p. 120). Furthermore, a clear and detailed chain of evidence which lead to the conclusions arrived at (Anderson, 1990; Bassey, 2002) has been provided, including a transparent description of the process of data collection, and the hermeneutic analysis of text. In seeking to address the question "Are we *interpretively* rigorous?" (Guba & Lincoln, 2005), the researcher has identified and acknowledged their own bias (Gadamer, 1995; van Manen, 1990) in the coming to the interpretations provided, and findings have been discussed and challenged by a "critical friend" (Bassey, 2002, p. 120), namely the researcher's supervisors. Finally, in acknowledging that "the value or 'truth' of case study research is a function of the reader as much as the researcher" (Wellington, 2000, p. 99), this study has acted "with energy to ensure that all voices in the inquiry effort had a chance to be represented in any texts, and to have their stories treated fairly" (Guba & Lincoln, 2005, p. 207). These crafted stories of participants, expressed in their

own language, are hereby presented and the reader invited to come to their own conclusions.

Ethical Considerations

In gaining the approval of the Auckland University of Technology Ethics Committee (reference number 07/156), this research has been demonstrated to meet the seven key principles of ethical research – namely those of informed and voluntary consent, respect for rights of privacy and confidentiality, minimisation of risk, truthfulness, social and cultural sensitivity including commitment to the principles of the Treaty of Waitangi/Te Tiriti O Waitangi, research adequacy, and the avoidance of conflict of interest.

In this study, as the participants were drawn from Aotearoa New Zealand, it was acknowledged that the principles of Treaty of Waitangi/Te Tiriti O Waitangi, underpin the research process with all groups of people in this country. This is best highlighted by Cram (2001), who in her exploration of guidelines relating to the ethics of Kaupapa Māori research notes that, "as in other areas, what is good for Māori is good for people in general" (p. 38). The agreed values of Partnership, Participation and Protection (Auckland University of Technology Ethics Committee, 2007) were therefore embedded in this investigation as evidenced in the relationship of reciprocity between researcher and participant, the spirit of participation which was voluntary in nature and allowed for withdrawal at any time up to the completion of data collection, and the active protection of participants from coercion, deceit and breach of confidentiality.

The importance of the Principle of Partnership influenced both the design and research practice of this study, notably in the acknowledgement of "He kanohi kitea" (Cram, 2001, p. 43), the importance of meeting with people face-to-face, and "Manaaki ki te tangata" (Cram, 2001, p. 45), the collaborative and reciprocal nature of the relationship between participant and researcher. This awareness of the need for the researcher to acknowledge their "participatory connectedness with the other research participants" (Bishop & Glynn, 1999, p. 103) was reflected within the research design in the employing of face-to-face unstructured interviews which promoted a relationship of "self disclosure, personal investment and equality" (Bishop & Glynn, 1999, p. 109). In this form of interviewing, the participant "plays a big(ger) part in determining the direction" of the interview (Mutch, 2005, p. 126) and the "reciprocal design and co-joint

responsibility for structuring the interview partly addresses the impositional power of the researcher" (Bishop & Glynn, 1999, p. 110). The reciprocity inherent in partnership was also underlined in practical terms in the sending of a koha and personal card expressing the researcher's appreciation to each participant on the completion of data collection.

Within the design and practice of this research project, the Treaty Principle of Participation was reflected in the invitation to participate which ensured that any such participation was completely voluntary in nature, and based on an understanding of adequate information. These processes of participant recruitment and selection have been described earlier in the chapter, with copies of relevant participant documents being lodged in the appendices to this report.

Of paramount concern in this research project was the Treaty principle of Protection, as reflected in the respect for the rights of privacy and confidentiality, and the minimisation of risk to participants. In accordance with the participant selection criteria, participants were from a number of post-primary educational workplaces, and had formerly occupied a leadership position within that workplace. In being invited to be interviewed regarding their experience of the relinquishment of the title of leader while continuing to teach, participants were thereby necessarily being invited to recount experience potentially linked to the context of their current place of work. There was the possibility of a degree of risk inherent in this which was minimised through the taking of all reasonable steps to guarantee participant confidentiality. Each participant was advised in writing that they had the right to withdraw their information at any time up to the completion of the data collection process, and was also requested to verify their individual transcript after the interview had been carried out. This provided participants with the opportunity to amend, or remove, any information which they felt might identify them or they may have been uncomfortable with. No interview transcripts were seen by the researcher's supervisors before being verified and amended, and the researcher reserved the right to employ the use of pseudonyms, and the changing of gender and/or non-significant dates in the interest of the protection of the identity of the participant in all subsequent data analysis and reporting. In addition, before the interview took place all participants were advised that they could stop the conversation at any time, and were provided with the contact details of the counselling service of the

Auckland University of Technology Health and Wellbeing Centre should the sharing of information during the course of the interview cause them any discomfort.

Finally, with regard to the protection of participants, it is noted that this study did not involve the use of deceit in any stage of its implementation, and specifically, in either the recruiting of participants, or method of data collection. Participants were truthfully made aware before signing the consent form that this study would result in the production of a thesis, in partial fulfilment of the requirements of the Master of Education, and may result in other presentations or journal articles.

Summary

This chapter has outlined the constructivist theoretical underpinning to the present study and provided a rationale for the selection of a descriptive multiple case study design. Procedures for data collection and analysis have been described, and in particular, the strengthening of this study through the employment of a hermeneutic approach to the interpretation of the descriptions of lived experience collected has been discussed. The process of self-interview as a means of orienting oneself to the phenomenon under study has been explained, and researcher pre-understandings of the phenomenon of stepping out of leadership yet remaining in the workplace made explicit. The trustworthiness of the investigative procedures has been demonstrated, and ethical issues relevant to this study addressed. In the following two chapters the findings of this study are presented, with Chapter Four dealing specifically with the uniqueness of experience as manifest in the crafted stories of individual participants and their interpretations, and Chapter Five offering an uncovering of shared themes, common across the range of experience.

Chapter Four: Findings I – The Unique

As the first of two, this findings chapter has, as its central focus, the unique experience of the individual leaders in this study. Given the current lack of research around the phenomenon of leaders stepping aside yet remaining in the same workplace, this chapter therefore seeks to give voice to, and honour, this experience. Thus, a "reconstructed life story" (van Manen, 1990, p. 170) of each participant's individual experience is presented here, beginning with the story of Amelia. These stories were crafted, most importantly, using the participant's own language as drawn from verified interview transcript, in order to retain and safeguard embedded meaning. A full example of this story-crafting process is included in Appendix D. Immediately following the crafted story of each leader, a hermeneutic interpretation is offered which serves to begin to explore possible meanings, and offer provisional understandings, of each unique individual experience.

Amelia

The title Academic Manager made me smile. I did go into the position with my eyes open to a certain degree, but was still quite surprised by the amount of student administration involved. A more accurate title for the job was Student Administration Manager. This is a big school with between 200 and 400 students and I was just processing students all the time. Probably 70 to 80 percent of the time was just dealing with students who wanted to change classes, probably about 10 to 15 percent was dealing with teachers and their needs and wants, and then the other 5 percent of the time was dealing with emails and things for Head Office.

The ability to have a vision as an academic manager, and to work towards creating that vision, was attractive to me but the reality of the job was that, as with any big corporation, you weren't able to enact your own visions, you were enacting someone else's vision and that's a very different thing. All the decision makers were remote from the school and I never saw the people who made the important decisions. As far as I know they never came to Auckland and were very unaware of the challenges that we faced.

The school was consistently understaffed and people were extremely stressed. A lot of teachers who'd been there a long time had got very used to doing things their own way; they'd not been observed, they'd not been trained, and it was a bit like a hive of bees that had been left to its own devices at the back of the meadow for many years – woe betide anyone that comes near it!

I think the school's been seen as a cash cow for a long time and they've just been trying to make as much money as possible. That's the only logical explanation for the consistent under-staffing of the school both academically and administratively. The school's certainly run by accountants, it's got a very good sales and marketing operation but very poor academic standards, yet that doesn't seem to matter. For example, the school was obviously keen to employ newer teachers because they're cheaper, but for survival, and to solve some of the problems like students constantly wanting to change classes, I decided I needed to recruit experienced teachers who could come in, pretty much get on with the job and teach to a good standard to give the students what they were paying for. So I actively recruited experienced teachers and that solved the teacher crisis. It's funny though, because only I perceived there to be a crisis; the company were quite happy to employ these cheaper teachers, and no-one particularly confirmed that students weren't learning or unhappy. I'm surprised that the students didn't complain more about it, they just voted with their feet. Having to implement poor academic decisions for financial benefit was not something I felt comfortable doing, so I guess that's where there was a mismatch, and I recognise now that there will always be a mismatch with any kind of organisation that size and me. I couldn't maintain my own minimum academic standards, for my staff and for my students, and there was no real desire from the company to support me in trying to achieve that. I had to do the job to a standard where I was personally happy and my lowest academic standards had to be met. They were not, so ultimately, that led to my resignation.

In the build up to my resignation, from September through to December, the school had been exceptionally busy. We'd had much higher than expected numbers and I had no extra support despite constantly asking for it. I was told I had to write down and justify why I needed the extra support, which I just found insulting. I hadn't really got time to write down a proposal and the Principal was using all these little stalling techniques – the budget, the budget – and I thought "Well, get the budgets to teach if they're so bloody clever!" I didn't think about returning to teaching, it didn't even cross my mind,

and I didn't plan to resign when I did. I just thought this is ridiculous, it's really busy, I'm not getting any job satisfaction at all and when [*the principal*] asked me if I wanted to resign I said yes, I just couldn't hold back. I didn't plan to say yes, but when she said that, I said yes. By the end of the week, my successor had taken over my job and when I had talked to the Principal and resigned verbally, she had said "Would you like to be a teacher here?" and I had instinctively said "Yes, I'd love that" without even thinking about it.

The transition was very quick and very smooth. Once I'd turned up in the staffroom and put books on my desk, I was just a teacher. I think the other staff were a little bit shocked initially but after a week or two of 'Oh wow, you know, a surprise change' they started to welcome me more. I started talking positively about what I was doing with my students and I think after a short time, the other teachers picked up on that and saw that I was actually good at teaching. I have a very open and honest relationship with my successor, and I think she enjoyed having someone there who knew what she was going through. We provided and gave mutual support for each other through those role changes.

When I took the teaching job I thought that I'd just do it for a few months and either change career or get a better paid job somewhere else, but the job is great! It's been like a breath of fresh air after being in such an awful position before and I've done it for twelve months now. The autonomy, the job satisfaction, and the variety are the things I love about teaching. I'm still struggling to find another job which provides those three things.

Interpretation

One of the recurring and central elements to Amelia's experience of stepping out of leadership is that of vision, or more accurately, the sense of dis-ease experienced at the "mismatch" of seemingly competing visions. It is apparent first of all, in her recounting of her story that, as an educational leader, Amelia has a very clear sense of purpose or vision for her students and staff. This vision seems to be frequently couched in terms of 'standards' and more particularly as educational or ''minimum academic standards." These standards are so important for Amelia that she notes "my lowest academic standards had to be met and they were not so, ultimately, that lead to my resignation." What is striking in this account is not only the strength of Amelia's vision but also that

it seems to be in conflict (or at best occupy a state of ambivalence) with the visions of other players in this workplace. These players include the school's corporate management, existing teachers, and the students. It is certainly clear that Amelia's vision of academic standards is in conflict with the corporate or financial vision held by the company which she describes as being "in terms of the numbers." She is obviously frustrated, for example, with the company practice of hiring inexperienced "poor quality" teachers simply because they are "cheaper" despite the negative educational impact. She believes that the school is being run by accountants as a "cash cow" and that trying to make as much money as possible offers "the only logical explanation … for the consistent understaffing both academically and administratively." The mismatch apparent here between a financial and an educational viewpoint is experienced very deeply, and the degree of dis-ease it causes Amelia is evident in her comment "… get the budgets to teach if they're so bloody clever!"

Secondly, Amelia's vision also seems to be a source of conflict for some of the existing teaching staff whose presence in the workplace she describes as being "like a hive of bees that's been left to its own devices for 5 years." Without being regularly handled, that is, trained, observed, and challenged in their beliefs and methods, the teachers, like bees, will attack you she suggests. The use of this metaphor, and indeed of the emotionally loaded word 'attack', gives another sense of the mismatch of vision, and the associated dis-ease, experienced by Amelia within the workplace. In Amelia's final shift out of the position of leader to a teaching position there are indications that while this sense of dis-ease continues to be experienced initially, there does appear to be a coming to a place which is more comfortable. She observes that some the older teachers may have viewed her with caution as they had originally seen her "very much as an outsider coming into their domain", and a domain over which they had traditionally had "ownership." However, she notes that in her shift to teacher, while "some of the older crew were a little bit wary initially, [but] they all came round fairly quickly."

Thirdly, Amelia's vision appears to be somewhat at odds with what the students seem to need to keep them satisfied. While she is conscious of working to ensure academic standards and "to make sure the students were getting reasonable value for money", she also acknowledges that "basically where you put a group of young students together … they'll have a good time because they're all young, and they all go out and have some fun together, and they get to meet people." In Amelia's experience, this student

satisfaction is reflected in their graduation speeches despite the fact that "actually, academically they haven't achieved very much at all, or been educated." The disappointment and frustration over the mismatch of what is required for student happiness leads her to conclude that "many students don't know what a good lesson or teacher is" but they have a great time, say great things about the school, and "the school sort of basks in the glory of that."

Ultimately, given the mismatches in vision described, Amelia's experience of leadership has about it a huge sense of isolation or 'aloneness'. She herself admits that "only I perceived there to be a crisis" in academic standards i.e. not the company, staff or students, and that consequently, she experienced little willingness or support from other parties for her efforts to affect any change. Her comments that "I was advised to get support from my own Principal but I didn't really feel that was the issue, it wasn't the support I needed … I needed a company, a supportive company, not someone to say 'There there, ok, tomorrow's another day'" add weight to the state of isolation that Amelia finds herself in. In terms of the corporate structure of the school it is clear from her frank observation "all the decision makers were remote from the school" that Amelia feels isolated from the senior management, but that it would have made "a huge difference" if they had come to "actually meet the teachers, and meet the students, and actually take some interest." What, then, is the impact of professional and personal isolation in Amelia's experience of leadership, and the stepping out of leadership? Perhaps a sense of aloneness is an inherent part of any leadership position? Or does Amelia's acknowledgement that her leadership sounds as if it is "my way or no way, and maybe it is a bit like that" suggest that perhaps a degree of the isolation experienced in leadership may be linked to the manner in which leadership itself is viewed?

It is interesting, in considering the decision-making process around Amelia's stepping out of leadership, that she admits she didn't plan to resign when she did and certainly didn't plan to be teaching in the same school 12 months later. Although there had been a build up of dis-ease related to the vision mismatch, and the symptomatic experiencing of this as an "increasingly stressful" situation and a lack of "any job satisfaction at all", it took a specific event and the asking of the question by the Principal to finally trigger Amelia's resignation. The decision to step aside, then, is made in the moment – unplanned and without 'holding back'. Furthermore, in her choosing to accept a teaching position, Amelia describes the decision as an "instinctive" saying yes, made

"without even thinking about it", completely un-contemplated. How important therefore is this element of instinct in the making of high stake decisions? What is the place of an awareness of 'the moment' in decision-making? Certainly for Amelia the degree of confidence and awareness sufficient to make an instinctive decision is a significant feature of her stepping aside from the position of educational leader. The notion of 'instinct' carries with it the suggestion of an unconscious accessing of deeply held values. In Amelia's case she has perhaps allowed these deeply held values to directly inform her decision-making and to draw her back to teaching, without going through a process of rational thought. The values, as she later describes them in terms of elements of an ideal job, are autonomy, genuine job satisfaction, and variety. It is interesting to reflect that these valued elements appear to be almost entirely absent from Amelia's role in the position of leader with her never seeing "the people who made the important decisions", describing the position as "intolerable" and finding herself spending 70-80% of her time just dealing with students who wanted to change electives.

Natalie

About eighteen months ago, I was Director of Studies at my current workplace. In my background I have been a teacher and had other leadership positions, and although I have never really liked educational administration in leadership, I loved the people side of it, loved the people side of it! I have realised that my skills are not with paper, they're not with administration, my skills are with people, but I think that within education in New Zealand the mix has gone to the point where, if you're in educational management, you do everything. Certainly the demands are there: the administration demands are there, and the people demands are there. So in my leadership position I worked both areas but still favoured working with the students, working with the staff, and problem solving more. That's really how I see a management role, but there are always demands to be doing what I would call petty administration tasks that seem to intrude! Doing spreadsheets, and calculating hours, and writing documents, is an essential part of education under the requirements that we now have for NZQA[1] and the bodies that be, but for me it always comes back to the students – what are we doing for them? In the

[1] NZQA is an acronym for the New Zealand Qualifications Authority, the crown entity responsible for the quality assurance of secondary and tertiary qualifications, and education providers.

leadership position, I put the people first so I found that, even though one tries for time management, the time pressure becomes quite high so you're doing your people jobs – your student jobs – first, and then you're going like mad just to catch up on that admin. When I fortuitously injured my shoulder, I had two weeks in a hospital to contemplate, "Is this what I want, is this what I need?" and came back quite prepared to give up that leadership role. I have to say, too, that my personal life has an impact on my decision-making. When it comes to looking at, "Do I want extra money, and extra kudos, and extra power?", if it doesn't suit me, no! So I stepped out of the leadership position but the relinquishment is slightly tainted because I'm still on the management team and although eased out of one role, other roles tended to grow. So it's not a complete stepping into a teaching role and I guess that suits me.

In terms of the relationships since I stepped aside, I think that if we work in a team, everybody brings different strengths to that team and so it's quite interesting to see how someone looks at a role in a different way. They approach things differently and they might not do things the way I would do them, they put a different slant on it. My successor, who took over the leadership position, is very capable and the door is open; he's great to work with and so I don't see it as a loss. The students really just saw me as [*myself*] when I was in the role, and they still do now that I have stepped aside. My relationships with the other staff have continued on really in a professional manner and I guess they always have. Some though, when I stood down, have been more honest and said what they enjoyed of my working relationship and style, but it was interesting that they didn't come up and say that to my face when I was in the management role.

I've always taught plus had those administration and management roles, so that with the pressures of the job, sometimes you're perhaps not putting as much time as you want to into the teaching. I feel that I've personally resolved that now and that I can put my time into my teaching and can enjoy it. I mean you can give as much time as you want to teaching and I see the extra time as an absolute bonus! To actually have that time to think, to prepare and to perhaps try a few more things, and just look at the students and reflect on how they're going and what they need, is great.

Ultimately, in stepping aside from the leadership position, I've made a good choice that suits me personally as to how I want to spend my time, and the emphasis I want to put on ambition or career, and the emphasis that I want to put on personal life choices. I've

still got the interest level in where we're going, what's happening, why we're doing it and what we could do otherwise – and then I've got the teaching as well.

Interpretation

A central thread running through Natalie's recounting of her experience is that of people versus paper, or more precisely, people before paper. It is in the first two minutes of the interview, for example, that she indicates that in her leadership roles she has "never really liked education administration" but "loved the people side it, loved the people side of it!" This contrasting of people and paper may perhaps be seen as both an insight into the personal priorities and values of this particular leader, and perhaps as a broader distinction between leadership and administration. For Natalie the "doing [of] spreadsheets, and calculating hours, and documents", while being acknowledged as a part of the current educational mix where a leader is expected to "do everything", does not "suit" her. These tasks suggest more of a managerial aspect to the role and seem to be regarded as being distinct from the more relational, human side of the role which she favours. Natalie's experience, then, of stepping out of the position of leader may be argued to be viewed at least in part as a decision to step away from administration or a paperwork driven style of management.

What features strongly in Natalie's description of the leadership transition is that while she has stepped out of a position with the title of leader, she certainly has not left the role of leader. She herself describes this shift as a "tainted" stepping aside, and it is interesting to note that after giving up the leadership position, Natalie immediately sets to work mentoring a new incumbent in another senior leadership role even while she is still at home sick with a physical injury. She continues to maintain a presence on the management team but perhaps most importantly, there appears to be a close relationship with her successor whose door, she says, is always open and who is "great to work with and so I don't see it as a loss." This suggests a valuing of Natalie's skills and experience by her successor, and a facilitating of her ongoing ability to contribute at a leadership level. Indeed Natalie comments, "we work together" and "my falling down or going to a lesser position is still…is still fine because we have open communication." Although Natalie uses hierarchical language to describe her positional relinquishment, it is clear that her experience of the shift is a positive one, and that an ongoing role exists for her. How may we distinguish between the stepping out of title and the stepping out of role in

positional relinquishment? What is the importance of maintaining a role in the experience of stepping aside from a leadership position? Perhaps, in fact for Natalie, she has not given up leadership at all, but simply stepped away from someone else's definition of leadership (as applied to the title of her former position) in order to be closer to her own definition of what a leader is and does. This 'other persons' definition of leadership is seen to be imposed by New Zealand's current education system and "the requirements that we have now for NZQA", and includes what Natalie calls "petty administration tasks that seem to intrude." Natalie acknowledges that her "professional integrity will always argue for a student or staff member and that would come to the fore before the paperwork." This reinforces again the notion of a distinction between people-centred leadership and administration, and suggests the increasing colonisation of leadership titles by administrational roles.

Natalie repeatedly refers to "what I want, what I need" and "what suits" throughout her retelling of her experience. To know "what suits" indicates a high level of awareness of self, an understanding of skills, strengths, and values, as well as an accurate appreciation of what leadership might, or might not, involve. This awareness includes, importantly, the place of personal and family needs as well as those which may be regarded as professional. Furthermore, Natalie's willingness to act on "what suits" suggests a degree of courage. That her lived experience of the transition out of the leadership position itself is remarkably comfortable and positive is perhaps a function of Natalie's sense of clarity and courage in seeking what suits. It is also interesting to note that in discussing the transition process Natalie attributes much of the smoothness of the shift to others: her successor being "great to work with", the students being "respectful" and the staff continuing a positive professional relationship having already "accepted" her and given support while she was in the position of leader. The importance then of the place of others in the experiencing of the stepping out of a leadership position is something to be seriously considered.

Steve

I was a Dean and in our school the Deans followed the same cohort of students all the way through the school starting off at Year 9 until the kids finished. I did two whole batches, so 10 years, plus one more year and then I quit from that position. The Dean's role was big, it was really big! I had 300 [students in year 9] and it was like running a

whole school really. We enrolled the students first and then put them into option subjects, created timetables and then did the streaming[2] in conjunction with guidance people. You were carrying out those sorts of processes the year before, for the new year, and then once you had started the year, there was the whole pastoral business which then took over; making sure that things were going all right for the students. That involved dealings with the kids, the staff, and the parents. There was a whole range of weekly meetings, and there would be regular welfare/police meetings, and meetings with the senior management teams – so lots of meetings. I wouldn't leave School before 6 most nights because I needed to ring parents and I found that the parents were often at home at 6pm so that was a good time.

I enjoyed trying to make sure that the kids' transition into secondary school was a successful one, and that they stayed happy and focused and got something out of it. I enjoyed trying to make that happen. I didn't enjoy it when it didn't happen, and when kids went off the rails and I took that hard. If I'd done all I felt I could do and the kid was expelled, or put out, because they continued to buck the system, misbehave, thieve or whatever, I sort of took it personally and felt I had failed. That's one of the main reasons I quit - taking it all personally. Another reason I quit was that I'd get phone calls at home; parents could find you at home and ring you on a Friday night. So the job was coming into the after hours and into my own home. There were also lots of meetings and that was another of the reasons that I quit from that position.

In terms of the timing of making the actual decision to step aside from the leadership position, I had found myself back in the cycle with a new batch of kids at year 9 again, and the issues which were coming up were the same sort of issues that I had dealt with before. There were issues such as "I've got no friends" and "So and so is picking on me." You get that at junior levels and maybe I was not being so receptive to those complaints from the kids anymore; perhaps I was getting a bit hardened. I thought "Oh gosh, this is going to happen all over again, I'm over this!" I was getting tired of the repetitive nature of the job, and I wanted more time, so I stepped aside.

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[2] Streaming refers to the policy and process of allocating students to classes by dividing them into groups of similar academic ability.

After shifting out of the leadership position I stayed at the school because I enjoyed teaching my subjects, seeing the kids love those subjects, and seeing them blooming. The school itself was just down the road, only 10 minutes drive with no traffic lights, and I could be on the harbour by 4 o'clock, so it was also a lifestyle choice.

I never regretted my decision. The new person was a very competent person and she slotted in very well, I feel. It was all well set up, the hard work is really at the end of the previous year preparing for the next year, and the Dean's were buddied up so that Year 9 and 10 Deans would go to the meetings with the Principal together. With respect to my relationship with the students after the shift, I don't know if they felt deserted or not. There might have been the odd comment, like "Why have you left us?" I did notice that classroom discipline is a lot easier if you're a Dean; you have a certain mana. You probably have to raise your voice a wee bit more as a non-Dean person so that's quite interesting. I found that my contact with the staff increased and I could converse more freely in the staffroom. I had seldom got into the staffroom at lunch times or morning tea times [as a Dean], because you just worked through, or quite often at lunchtime you'd go out looking for a kid. I notice now that the other Deans are seldom in the staffroom. If you do go into the staffroom you just get hit! People come up to you as you're pouring a cup of tea and say "What are you doing about so and so?" and "Johnny is a little toe-rag, what are you doing about it" or "My class is too big." As you're eating your lunch, you just get hammered! So, it was a plus, I was actually socialising with the staff again and that was nice. Financially, before tax, I was getting somewhere between $3,000 and $5,000 extra [for the Deans role], but after tax, for all the hassle, it was hardly worth it you know for a couple of thousand. I'd rather take the cut and spend some quality time.

Interpretation

Steve's experience of leadership, and the stepping out of it, is imbued with a strong sense of personal responsibility. This sense of responsibility perhaps originates in, or is signified by, Steve's understanding and belief that he was chosen for the particular leadership position as a result of personal qualities, rather than any specific training or skills. As he indicates, "you were sort of picked because they thought you had it in you, you know; a pastoral care sort of person. I guess they decided to offer it to me on that basis." Furthermore, in his experience, Steve comments that having been selected, there

was little in the way of professional development or up-skilling provided with the role. Again, the emphasis seemed to be on inherent personal attributes, with a sense that "once you were in [the role] – that was it."

If appointment to the leadership role, then, is perceived to be based on 'having it in you' as a person, it is perhaps unsurprising that in carrying out the role, there is a strong sense that 'the person' him or herself is on the line. If things go well, or poorly, in the leadership position it is the personal, not only the professional identity, which may be impacted. Steve's 'having it in him' is evident in his initial description of his role where he comments "I took it quite seriously, I was conscientious … and the welfare of the kids; I tried to see every kid at least once a term." In the self-framing of his role, there is a very clear focus on a personal commitment to all students. Steve's sense of personal responsibility seems to extend his role beyond what might perhaps be seen as a purely functional one of organisation and discipline, to one where "you're not just seeing the bad kids, the kids with behaviour problems, you're seeing everyone, you're seeing the quiet, conscientious ones and giving them a little pat on the back." In considering the most enjoyable parts of his leadership position Steve highlights "trying to make sure that the kids' transition into secondary school was a successful one, and that they stayed happy and focused and got something out of it." He notes "I enjoyed trying to make that happen." Once again here, there appears to be a strong sense of personal responsibility for the students' happiness, and the corollary of this is that when "kids went off the rails [Steve] took that hard."

In the build up to the stepping aside from the leadership position this sense of personal responsibility within the role appears to be a crucial factor. Steve explicitly acknowledges that "one of the main reasons [he] quit [was] taking it all personally", and further expands in commenting that "If I'd done all I felt I could do and the kid was expelled, or put out, because they continued to buck the system … I sort of took it personally and sort of felt I had failed." For Steve, there was a sense that he had "let staff down, let the kid down." Indeed, in the making of the decision to shift out of leadership Steve had the expectation of getting "more time and I suppose less responsibility" and he found that as a result of the shift, as he had hoped, he "stopped being responsible for the kids and taking it as personally as before." Interestingly, however, when reflecting on any perceived change in the relationship with students as a result of stepping aside, Steve's immediate response is "That's a good question. Don't

know if they felt deserted or not …", still suggesting an essential sense of concern and responsibility for the students.

Another feature of Steve's experience is that the high degree of personal responsibility exhibited appears to lead to an associated sense of vulnerability both within the institution and at home. Putting one's person on the line in a work setting made Steve vulnerable in the staffroom where he wryly observes that "you just get hit – they come up to you as you're pouring a cup of tea and say 'What are you doing about so and so?', and 'Johnny is a little toe-rag, what are you doing about it?' or 'My class is too big!', and as you're eating your lunch, you just get hammered! I guess that's another reason why I quit." Steve has a clear sense of "get[ting] the blame if a kid's misbehaving" and, in addition to the overt challenges and comments made by other staff, is also aware of "muttering in the background." It is telling that he uses the military metaphor "the first line of defence" in describing various parts of his leadership role and that this conjures up images of being in danger and under fire is not accidental. Steve confirms the sense of vulnerability and of being under fire through having his actions talked about in acknowledging that "you are doing your best, but you kn[o]w that's probably going on and I sort of felt that."

In an effort to deal with this vulnerability within the school environment Steve observes "that some people say 'Put it in writing', I know some people in that position just do that. And then it sort of defers it I suppose." It is implied however that this is not an approach which Steve finds satisfactory and, given his demonstrated sense of high personal responsibility, it is perhaps unsurprising that deferment is not a preferred option. Other strategies to deal with vulnerability might include physically avoiding situations and areas where the leader experiences this vulnerability, for example, the staffroom at lunchtime, and Steve does "notice now that the Deans are seldom in the staffroom." While perhaps effective on a pragmatic level, what might be the cost of this strategy in terms of personal and professional isolation?

This sense of vulnerability even extended into Steve's home in that "parents could find you at home and ring you on a Friday night and say, 'My daughter hasn't come home' you know… or 'My so and so has run away', and 'What can I do?' So it was coming into the after hours, into my own home." This clearly is not only an issue in terms of the extra time required to deal with these phone calls, but that work is intruding into private

life and even being at home is not 'safe'. Ultimately Steve comes to the conclusion "I don't need this, not that sort of stuff", and feels compelled to get an unlisted number in order to reduce the vulnerability.

Steve's stepping aside from the leadership role certainly seems to have been effective in reducing the responsibility and associated vulnerability within the workplace in that he no longer had to "field those complaints … not being a Dean, you don't get any of that." This allowed him to "converse more freely" with staff and affected his collegial relationships in a positive way as he notes "it was a plus, I was actually socialising with the staff again – that was nice."

Perhaps this sense of vulnerability is an unavoidable feature of the experience of leadership for anyone who feels personally engaged with, and responsible for, others. To what extent might this vulnerability be recognised in leadership, and could, or should, its effects be ameliorated? Perhaps vulnerability is essentially bound up with the very qualities for which Steve was appointed to the leadership position in the first place.

Although there is abundant evidence that Steve is a caring and responsible person, it is interesting that one of the reasons that he gives for stepping out of the leadership position is that he is "getting a bit hardened." He feels that he is perhaps "not being so receptive to those complaints from the kids anymore" and that there is such a sense of déjà vu in the common issues that younger students, new to the school, are raising that he thinks "Oh gosh, this is going to happen all over again, I better sort of think about quitting." What is this desensitising process which seems to have occurred here? Is there a role for the school to play in monitoring, or actively trying to prevent, desensitisation of its staff? What role does the individual play and how much responsibility should they assume for what might be called their own ongoing 'fitness for the role'?

A final feature of Steve's experience of stepping out of leadership is that he makes a clear decision to value time over money. He speaks of lifestyle and in evaluating his leadership role and its impact on lifestyle, Steve comes to point where he makes a decision to "just enjoy myself, take it a wee bit easier and have some more time for myself." He highlights the fact that the financial compensation was simply not in line with the work being done and comments that in his own situation "before tax, I was getting somewhere between $3000 and $5,000 extra, but after tax, for all the hassle, it

was hardly worth it you know, for a couple of thousand … I'd rather take the cut and spend some quality time."

Marguerite

Overnight, the previous leader left and I was approached to step up from a position of being second in charge to take on the leadership position for a fixed period from mid 2003 until mid 2005. In the leadership position I was specifically involved in what I would call a lot of politicking; meeting politicians, directors, shareholders, other operational heads on the same campus, being part of [*professional organisations*] and seeking funding, so external relationships were very important to that role. There was also a large component of the job that was financial. I continued to have complete control over things that I'd done before like workloads, staff recruitment, staff appraisal and teaching. My teaching load didn't change, although I was pressured to change it. I was hesitant to give up what I had done before because I was hesitant to find myself in a vulnerable position at the end of the two year period.

I think if I had let on that the pressure of work was huge, they would have insisted on doing something about it but I just wouldn't go there, for my own reasons. I think because of the vulnerability of when I came to leave the leadership position, to bring somebody in now to take the job that I had been doing would be to then find myself without a job at the end.

In the leadership position, I was definitely on a huge learning curve and it was a very successful time. I tended to be the kind of person that was involved in most of what happened, so I did delegate, but I also was involved, so I knew what was going on the whole time. I certainly didn't sit with my legs up on the desk as the [*Head*]; I wasn't that kind of a leader. I was hugely affirmed in the position and if I'd applied for the job, I would have got it without any doubt. I also think though that no money on earth can pay you for the stresses of the job; it's a very stressful job and it's lonely too. At times I did consider maybe applying for it, but by the time the two years had gone, largely due to the stresses related to the position because I was carrying one and a half jobs, I decided to step down back into a [*deputy leader*] position again.

In stepping aside I just knew for me that I'd done my bit, and I still don't regret it, but I'd had enough. I honestly believed I could do it – I believed I could step down back

into my previous role. People who had tried to do it before had said to me "You won't be able to do it!" They said "You'll have to leave, that's the price you pay for picking up the role in the first place."

Having stepped aside, I found that with some of the staff, where there had been a strong relationship, that the relationship was unchanged and it didn't matter what position I'd been in. For some of the other people, there was almost no recognition of who I'd been, and that was quite strange. But for some of the people in management, there was an actual marginalisation of myself and that's what drove me out. I was totally and utterly marginalised, increasingly so, until every bit of responsibility was stripped from me, and I left at the end of 2007. The person who came in as the leader found me terribly threatening I think, although I really tried hard not to destabilise anything once I'd stepped out of the leadership position. I tried hard not to be a negative voice or anything like that, but I felt very disappointed and I was gutted that my experience was not called on. I began to withdraw from actually making comments or a contribution at all, and that's not healthy either. I had this absolute sense of vulnerability, powerlessness, and a sense of being hugely marginalised; of my voice not counting. So it was just really weird! I couldn't really understand how it happened but from making a big contribution, I moved very quickly to making no contribution at all and, I think, being seen as somebody they'd rather not have around because I knew too much. They'll probably say "Oh she battled to give up the leadership mantle" and I'll be the first one to say, that probably was quite true in some ways. You know, I lost my parking place, I had to go and find a park every day and I thought that wouldn't make any difference to me at all, but then, you know, you see other people parking in your place, it's those little things … I think once you've been in that position of leading, it's hard not to lead, it's hard not to lead.

Through all of that experience I went through a terrible identity crisis. I think that one of the biggest things that happened to me in stepping down was that I just questioned who I was: "Who am I? Who am I at work?" I've always been so secure in who I am and how I operate and all of a sudden, it's not working like it used to. The very people who I'd been closest to were the ones who found it easiest to distance themselves from me when I was not in a position of power, and so what did it say about the people I thought were my friends? They weren't my friends really, what they were there for was simply to be in the position that they wanted and it was almost like, [they] only spent time with

me and [they] only affirmed me because of the role that I was in, not because of who I was. It's only when you've been through the process yourself that you realise it is really hard to step aside and stay in the same workplace and a lot of it's to do with, I believe, your own identity in the new role.

So I felt like I was dealing with something that was a very personal thing that others were not even really aware of. None of the people in the leadership positions spoke to me for over a year, even just to say "How's it going, how are you feeling?" Nobody said to me "How are you doing?" I think even today, people have no idea of why I left. Nobody even really wanted to know!

At the end of the year, six months after stepping down and returning to the deputy leader position, I said I'd like to go back to full time teaching. Just to be a teacher was great! I was able to put much more time into my preparation, I was able to enjoy my lecturing – all of those benefits and it was the most wonderful thing to be back in. The reduction in stress in terms of what the job had been, that was big, and I feel that even more now, having moved out of the institute itself.

In the end I came to the conclusion that people are right: "The price you pay for picking up the role in the first place is that you have to leave if you step out of it, you can't go back and work within the institution!" I think I made my mark and my contribution in that time, and tragically, it would have been better to have left immediately.

Interpretation

Marguerite's experience of stepping out of leadership centres around the sense of being "hugely affirmed and supported" while in the title and role of leadership yet "totally and utterly marginalised" once she steps aside from position. This marginalisation is perceived by Marguerite to stem from being seen by the new leader as "terribly threatening", and is experienced as those who have gained position through her stepping aside, having "ganged up against [her]." Although Marguerite still holds a leadership title, one step down from the position she originally held, she feels that she is gradually stripped of all real power and notes that "from making a big contribution I moved very quickly to making no contribution at all." Is this sense of marginalisation an inevitable consequence of stepping out of leadership? Perhaps, as Marguerite observes, "once you've been in that position of leading, it's hard not to lead, hard not to lead." Is there a

differentiation that can be made in stepping out of position between the giving up of title and the giving up of role of leader? Marguerite's observation seems to suggest so. Although there was a voluntary shift out of title, there is a very strong experiencing of a perhaps not so voluntary loss of role as shown in her comments that, although "some staff still looked to me for leadership", "I was gutted that my experience was not called on." Marguerite battles with this loss of role, giving up of the "leadership mantle", and sense of marginalisation until ultimately, it is what drives her out of the institution.

A crucial feature of Marguerite's experience of the transition out of leadership is a "terrible identity crisis." She begins to ask significant and searching questions of herself including both "Who am I at work, I've always been so secure in who I am and how I operate and suddenly its not working like it used to" and the deeper follow on of simply "Who am I?" For Marguerite there is strong evidence of a link between professional identity and self identity. What is the nature of this link? How is identity constructed and maintained? Perhaps in Marguerite's stepping out of leadership there may have been differing impacts on identity depending on whether there was a sense of choosing to step out of title or role, or both, and the conflict between the intent and reality of these? Throughout Marguerite's questioning of identity she comments, "nobody said to me 'how's it going, how are you feeling?'" and this heightened her sense of marginalisation and loss. Furthermore, she discovers that "the very people that I'd been closest to were the ones who found it easiest to distance themselves from me when I was not in a position of power." Marguerite feels forced to question the entire nature of relationship and is faced with a realisation that the people she thought were friends perhaps were there "simply to be in the position they wanted." Perhaps 'betrayal' is not too strong a word for the sense of change Marguerite experiences in these relationships. This exacerbates the loss of identity for her and leads her to the bleak conclusion that these people "only affirm[ed] me because of the role I was in, not because of who I was." There is a pointing here again to the significance of the place of others in the experience of transition out of a leadership position. Are there any collective responsibilities that we may have to each other as colleagues in the shaping of the experience of a voluntary shift from a leadership position? If so, what might they be?

Elena

I was Assistant Principal in a New Zealand state secondary school for ten years, having previously taught in the same school for about eight years before that. There was a very collegial relationship amongst the whole senior administration, and how the Head functioned as a Principal was just as I functioned as a teacher: you expect people to do very, very well then you give them lots of space and you don't feel threatened by outstanding success of some of your own staff. Teaching, and working with students, is my passion, so I always kept classes because of how much I loved teaching and the positive student relationships. I feel very strongly that students deserve the very best, that each child is of value, and that you really operate through love. I didn't want to be Deputy Principal or Principal because then I would have lost out on the teaching.

My job descriptions were absolutely gigantic and a lot of that was my own fault because what I came to realise was that I was my own worst enemy and I could not stop myself from taking on more of the role. While I was in the leadership position I was working some enormous hours - seventy five would be a minimum I would think! I would often work at school till five, and then I'd come home and start the marking or preparation and I could stay up easily until twelve or one. I always got up at six. I've had to recognise that was my personality, if I was going to be somewhere, I wasn't satisfied with just walking in the door, doing my job very well, and walking out.

Around the time of the build up to my stepping aside I became increasingly aware of the quality of my life. I would find myself thinking "Oh I can't go out or I can't do this, because I have to do marking." I realised it was impacting on my friendships and the amount of time I was spending with other people who I would normally have spent more time with. I thought "I'm not living my own life and, while it's very connected, it's sort of swamping me too; pulling me in two directions", and so to step aside became a very easy decision for me to make. I did it – it was my choice to step aside – and it really was me moving back into control mode, reclaiming my own life and blaming nobody.

After stepping aside I shifted offices and I remember staff being absolutely scandalised at how much stuff was emerging from the Assistant Principal's office! I'm a great archive person so I went through and spent ages getting all my records right, thinned down, and all put in chronological order and then I had the interesting experience the

next day of noticing that the new Assistant Principal went through my filing cabinet system and threw most of it out! I was shocked that my successor didn't move to [*the local area*], ever! I felt disappointed, and it meant that he was often late for meetings or left early, but it wasn't really my problem. I think there's nothing worse than having someone saying "It's not the way I used to do it" and in fact, it was a sane level of contribution, probably.

When I stepped aside I decided to have one year of full time teaching, and then I went half time for one year, and then I had three years of being one-third of a teacher. I could easily have walked away but I didn't. I had a very clear image of what a wonderful experience of total autonomy there was in being in my own classroom with very intense, close relationships with the students and the sense that we're all part of the same community. That was a very happy time – just everything about it. I did find I just loved the relationships with the students, and I love leading people to enjoy learning.

Interpretation

A key feature of Elena's experience of both leadership and teaching is the intensity of the sense of connectedness present. It is interesting that within the opening paragraph of the interview transcript, in which Elena was asked to begin to describe her leadership position, 'relationship' is mentioned and commented on five times. Elena refers to having a clear image of "very intense close relationships with students" and continues further to describe a wonderful working relationship with the Principal, collegial relationships within the whole management team and returns again to positive "student relationships." Elena further reinforces this sense of connectedness in asserting that "we're [teachers and students] all part of the same community." She notes that she was changed utterly as a teacher by the experience of having her own children go through Play Centre, and that this change lead her away from the more 'distant' model of teaching where staff "were horrified at the thought of students seeing them out of the school context." In fact she goes as far as to acknowledge that, as a teacher, her approach was to "really operate through love." To speak of love in this way might suggest a willingness to truly know those who are loved as whole people – in this case the students – and seems to indicate the seeking of a significant and deep connection.

Alongside the emphasis Elena places on relationship and connectedness, there is also the acknowledgement of a vast workload and the emergence of a strong sense of

personal responsibility for this situation. The fact that Elena experiences her job description as "absolutely gigantic" is, she acknowledges, largely her "own fault." Throughout the describing of, and reflecting on, her leadership and teaching experience she frequently makes comments such as "I made work for myself but I couldn't stop myself from doing it", "I could not stop myself from taking on more of the role" and "what I came to realise was that I was my own worst enemy." There is a very strong sense here of personal engagement with, and contribution to, the role and a seemingly boundless willingness and capacity to give more. In practical terms, as Elena dealt with the demands of both the leadership and teaching positions, it appears that as she wouldn't allow herself to skimp on the teaching in order to fulfil the leadership role, this has meant that she carried out the leadership functions and "simply, then, did the rest." This doing of the rest involved a significant commitment of her time as she noted: "I would often work at school till five, and then I'd come home and then I would start the marking or preparation and I could stay up easily until twelve or one. I always got up at six." Elena highlights her own responsibility for the workload and admits "I've had to recognise that was my personality, if I was going to be somewhere, I wasn't satisfied with just walking in the door and doing my job very well and walking out." Ultimately the consequence of this prolonged period (10 years) of extremely intense personal engagement with 'the job' is Elena's coming to the realisation that "I'm not living my own life, while it's very connected, it's sort of swamping me too!"

Is it possible that in the viewing of teaching and leading as an essentially connected activity, occurring between whole people and within a sense of community, that the position of teacher ceases to be seen (or enacted) as a title, or even a role but that it perhaps becomes a 'life'? Perhaps the level of personal engagement necessary to "operate through love" is such that it can not be contained within a nine to five job description and becomes all encompassing. Certainly for Elena, there is an acknowledgment of the unsatisfactory nature for her in simply making a reduced, or perhaps what others might describe as a "sane level, of contribution." Indeed, her passion for teaching appears to have been a driving force behind what may be defined by implication as her 'insane' contribution. Perhaps it is particularly difficult or damaging for 'excellent' teachers who are promoted into more managerial positions to see themselves as becoming 'less good' in the classroom due to additional demands placed on their time. Elena appears to have dealt with this by simply putting in more

and more time. The extent to which this contribution has become her life is shown in Elena's description of her shift out of leadership as one of "moving back into control mode and reclaiming my own life."

Overall this experience is perhaps not so much centred around a deliberate stepping away from a leadership position but rather a conscious stepping back towards a teaching position. There is nothing in Elena's experience which suggests any particular lack of fit with what she saw as her leadership role, but clear evidence that the time commitment involved to carry out both roles as she wanted them to be carried out, was having a significant impact on her quality of life. Elena reaches a point where she acknowledges "I would find myself thinking, 'Oh I can't go out or I can't do this because I have to do marking.'" She also notes that her self imposed workload "was impacting on the amount of time I spent sometimes with other people who I would normally have spent more time with." It is possible that she could have 'reclaimed her life' by maintaining the leadership position but giving up the teaching, and hence in this way allowed herself the hours she felt necessary for the job whilst still having a life. However, as Elena indicates at the very beginning of the interview, "teaching is my passion, and working with students" and so for her the decision to step out of the leadership position and return to fulltime teaching "was happy, just everything about it!"

Simon

The leadership position I was appointed to was one of Senior Master[3], an old fashioned term, at [*a New Zealand state secondary school*]. Everyone had said to me when I left my previous school, you shouldn't go into admin because your passion is teaching but I never thought about that much, I just thought "Oh, you go on and you do these things." However, right throughout my whole administrative career I had always taught at least two classes, I had always made that a condition.

In a traditional sense I probably was seen as somebody who would be promoted fairly quickly and I'm still a little surprised in some respects that I wasn't. I look on that as something of a blessing actually, in retrospect, but at the time it created some pain. The

[3] Senior Master is a title that was traditionally used to describe a middle-level educational leadership position equivalent to what might currently be referred to as Assistant Principal.

school went through some turbulent times and so I found that it took up all of my energy just to help keep turning the place over from day to day. I was seen as a person that was kind of keeping things ticking over and that meant that I never could actually raise my head and say, "Well, hey where am I going or what's this doing to me?" I was on the treadmill, task centred. I got typecast into roles which I just kept on doing, and I think that was partly my fault. I also think the principals, as such, have so much power. It seems to me that the problem with management in New Zealand, and not just applying to teaching, is that basically the senior managers, whom I guess you could call the principals, are often jealous of their own power and authority, and are unable to hand it on or delegate it to other people except on their own terms. Good management works on recognising your talents and skills, and that's been deficient in the secondary schools I think. So, during the really awful period of the school, I just seemed to work myself to the bone for very little return but, in the longer run, I think I learned the most important lesson of all, which was humility and acceptance.

In retrospect I may have been lucky because I think if I had had a conventional career path and become a Deputy Principal and then a Principal, I would have got buried in administrivia. Certainly the least satisfying part of my Assistant Principal's role was just the remorseless administrivia: detention after detention, teacher relief after teacher relief – those very wearying tasks. A lot of it was just shitty work, but which had to be done given the context of the times. It's true to say that some of the newer educational initiatives that came in were initiatives I despised somewhat. The Ministry of Education should be called 'The Ministry of Who?' as they don't seem to have any philosophy or ideals. I didn't like the new management style; the corporate kind of school style of the early 90's arising out of Rogernomics[4]. I just really had very little time for that, and it's been discredited now, but an awful lot of people made their careers out of it.

So I came to a point where I had been an Assistant Principal for nearly 20 years and had not made progress, so to a lot of people that's just someone who's done nothing in that time. I think I'd done a hell of a lot, but I'd stayed in the same role, and I suddenly

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[4] Rogernomics is a term coined from the word 'economics' and the name of the then New Zealand Minister of Finance, Roger Douglas. The term was used to describe the free market and neoliberal economic policies pursued by Douglas following his election in 1984.

thought to myself "I don't want to continue with this administrivia!" I want to give it away and I want to go back to teaching.

One of the great glories I found about retiring from my role is that I made certain conditions to myself. For example when they came to me and said "We'd like you to take some management units in return for running this", I was able to say "No management units, I want no authority!" I turned my back on all of that and there were certain things I would not do. I would not attend meetings, because I think they are so debilitating, and I would not write and fill out innumerable forms which arise in schools before the arrival of people like the Education Review Office, and which sap our teachers' and Heads of Department's energy so badly. So, in that way, I think I freed myself of what in fact burdens the vast majority of teachers, and that has been really fabulous, really fabulous! I didn't mind the drop in status at all. In stepping aside from the leadership position I think there was a drop in what I perceived to be the recognition factor of being seen and noticed within the hierarchy. That occurs in little ways like car parks and things like that, and a lot of people are very reluctant to lose those minor manifestations of power. They mean a lot to a lot of people.

I feel I've always had very good relationships with the staff but I think they are better since I gave up the [leadership] position. I feel that they're just more natural, particularly from my point of view. I always imagined when I went and sat with the hard-cases in the corner of the staffroom, that they were slightly on their guard because I was from the admin system.

One of the things I have found very interesting since I retired, has been the appointment of new Principals and Deputy Principals in the school, and I have found that I have played very influential roles in that. Although I had stepped aside from the leadership position, when the last Principal was appointed, I was co-opted onto the Board of Trustees to act as an advisor and I think I played a pretty crucial role in the appointment of the current Principal. I found that very satisfying, particularly because I had the trust of staff and the staff wanted me to do it. The Board seem to value me, and I suppose to some extent I represent the collegial memory of the school.

In terms of my relationships with students, having stepped aside from the leadership position you do think that because you have less authority in the school, you'll have less

authority in the classroom. In my experience that proved to be pretty much unfounded and overall, in shifting out of the leadership position, I think the greatest joy has just been the simple pleasure of teaching; just being in a classroom, just thinking about your classes and not worrying about administrative systems. It's great just lying in bed at night thinking "That class are doing [*xyz*] tomorrow – OK", and working out a strategy as you're going to sleep then trying it out the next day. That's been enormously satisfying!

Interpretation

Central to Simon's experience of stepping out of leadership is the sense of celebration of freedom. In what he describes as "one of the great glories" of his shift he comments that "I freed myself of what in fact burdens the vast majority of teachers and that has been really fabulous, really fabulous!" For Simon this burdening centres around what he refers to as 'administrivia'. He makes it clear in his stepping out of the leadership position that he intentionally "would not attend meetings, because they are so debilitating, and [he] would not write and fill out innumerable forms… which sap our teachers' energy, and our Heads of Department's, so badly." In the nature and strength of Simon's language is a suggestion, not only of the freedom from administrational tasks in themselves, but also an indication of, and a celebration of the freedom from, what he perceives as the associated damaging effects on human wellbeing.

Given Simon's recognition and celebration of the freedom obtained in stepping out of position, it is implied that there must also have been a corresponding sense of a lack of freedom while in leadership; a 'confinement' of position. What might constitute this confinement? Interestingly, when asked if he had considered 'freeing himself' earlier in his career, there is an acknowledgement that he had not, in retrospect largely due to his being immersed at the time in the daily "ticking over" of the school; a sense of being "on the treadmill, task centred – just get[ting] the job done, fill[ing] out the relief form, fill[ing] out the form in a particular way." Perhaps this is a part of the confinement that Simon experiences in the leadership position. In an environment of turbulence and change he senses an expectation to provide stability and observes that "it took up all of my energy just to help keep turning the place over from day to day." "I got typecast into roles which I just kept on doing." There is a sense of confinement to a treadmill of a series of tasks, a lot of which he describes as "just shitty work that no one else would

do, but which had to be done given the context of the times." For Simon, then, the impact was that "I just seemed to work myself to the bone for very little return" and "it meant that I never could actually raise my head and say, 'Well, hey, where am I going?' or 'What's this doing to me?'" For how many educational leaders might this be true? What proportion of leaders experience confinement to a contextually driven treadmill which refuses to allow space for a raising of the head and a consideration of wider issues? Simon's experience of stepping aside from leadership, then, is on one level a coming to an awareness of the "ultimately very wearying" nature of the administrative treadmill, and of freeing himself from this confinement to "the remorseless administrivia" which limits his opportunity for wider reflection.

Another interesting aspect of Simons's experience of leadership, and the stepping out of it, is the societal 'taken-for-grantedness' of the assumption of a linear 'upward' career path. Underlying his 20 year period in leadership there is an element of unthinking societal expectation that career requires promotion, and that promotion means an upward movement through a system of hierarchically arranged positions. Simon himself, when describing his initial appointment to the leadership position, comments "Everyone had said to me when I left my previous school, you shouldn't go into admin because your passion is teaching. And I never thought about that much, I just thought 'Oh you go on and you do these things.'" This societal expectation of linear upward movement is shown to be sufficiently strong that the taken-for-granted 'going on and doing things' occurs even though it appears perhaps to be at odds with 'passion'.

That this expectation is embodied in social tradition is also reflected in the attitudes others around him, as Simon notes: "In a traditional sense I probably was seen as somebody who would be promoted fairly quickly." The taken-for-grantedness and 'normalising' of a linear upward career path is further reinforced in Simon's reference to "a conventional career path and becom[ing] a Deputy Principal and then a Principal." What is the view then, of society toward those who do not follow its conventions and taken-for-granted pathways? What impact might this view have on the individual?

There is an indication of the societal viewpoint in Simon's observation "I had been an Assistant Principal for nearly 20 years at that stage and had not made progress, so to a lot of people that's just someone who's done nothing in that time. I think I'd done a hell of a lot, but I'd stayed in the same role." The suggestion here is that the measurement of

progress requires a hierarchy and appears to be defined as movement from position to position, with each new position being deemed to be higher in the hierarchy than the last. The absence of this movement is viewed as having achieved nothing. For Simon, who has remained in the same role, the taken-for-grantedness of a conventional career path, and the societal view towards those who do not follow this, have something of a personal impact. He registers still being "a little surprised" at his lack of movement and admits that "at the time it created some pain." He goes further to explain that having applied for positions further up the hierarchy on a couple of occasions, and having got down to the last two candidates yet been unsuccessful "made that era … really hard; I had applied for the Principal's job and missed out, and come very close to it." If to stay in the same role without so called 'upward' movement causes pain and is regarded societally as having achieved nothing, how much more difficult does this make the decision to step aside from a leadership position? Ultimately Simon comes to terms with, and frees himself from the confinement of these societal expectations, and indeed, he is able to see his lack of movement from Assistant Principal to Deputy Principal or Principal as "something of a blessing actually, in retrospect." Simon concludes that "in the longer run I think I learned the most important lesson of all, which was kind of humility and acceptance."

While making it abundantly clear in his shifting out of the position of leader that he wanted "no management units … no authority", Simon however experiences a post-stepping aside sense of being valued, not so much for his administrational abilities, but interestingly, for his thoughts, perceptions and judgments. This is first perhaps evidenced in his awareness of talent within the institution with regard to others whom he observes were "showing skills that would cover the area that I had had to do" and might potentially become his "successor." In the eventuality that Simon does decide to step aside from his leadership position he has a sense of having "had a fair amount of influence" on the choice of his replacement. This sense of involvement with, and contribution to, the decision-making process suggests an ongoing valuing of Simon's opinion, and appears to play an important part in ensuring the transition out of the leadership position "happened very successfully and easily." The recognition of the worth of Simon's perceptions, and consequent sense of contribution, continues beyond his stepping aside and in fact appears to become more formalised. As Simon remarks, "one of the things I have found very interesting since I retired, has been the appointment

of new Principals and Deputy Principals in the School and I have found that I have played very influential roles in that. So much so that when the last Principal was appointed, I was co-opted onto the Board of Trustees to act in that role, and I think I played a pretty crucial role in the appointment of the current Principal." Despite having unambiguously stepped aside from position it is apparent that subsequent Boards of Trustees continue to see a role for Simon as "someone they could come to who knew the School", and who, with regard to staffing decisions, "knew enough about the School, and about the kind of poor management we'd had in the past, to know what the School didn't need." This ongoing role of influencing staffing decisions appears not only to be mandated by the Board, but also supported by the staff as evident in Simon's comment "I had the trust of staff; staff wanted me to do it." Overall, Simon has a sense that "to some extent [he] represented the collegial memory of the School" and that this role is valued.

How does this provision of role through the ongoing valuing and validating of his perceptions shape Simon's experience of remaining in the same workplace having stepped aside from leadership? It is perhaps important to note that Simon has willingly embraced this ongoing role when he may potentially have refused it either as being outside of his new job description as teacher, or for other personal reasons. It is clear that the provision of this role, and his acceptance of it, have resulted in a strong sense of positive contribution, post-stepping aside from position. Remaining within the school, then, without the title of leader, but with an ongoing role, has in Simon's experience "been particularly satisfying", and he reflects "that at this stage, when I'm almost ready to say 'good-bye', that the key people running the school … I've had some influence on their appointment and it's along fairly sound lines."

Ted

I was at [*a NZ secondary school*], and I joined in 19*XX* to become a Head of Department there. I could have stayed in [*sales*], and I know I would have enjoyed it! I would have made a lot more money – and my wife thought I was a better guy – but I had young kids, and they were playing sport and since I couldn't be at their sport, I made a lifestyle type decision and went back to teaching. It was really a family decision I made, rather than a money decision.

In the Head of Department role I found I never left work till … at the very least 5pm. I would be there on the weekends and I was putting in the hours, 50 to 60 hours a week, easy. You go home and you're knackered, but at the same time, I've got to say that I enjoy teaching. It's more of a mental tiredness than physical tiredness and even over the holidays, though we used to go camping, I would take my books with me and on days when it was raining I would sit down with my books and be writing and sorting out schemes. And so, you know, it never really leaves you, you're always… you might be out fishing but you're always thinking about it.

In the time leading up to my decision to step aside from the Head of Department position there were two new people that came and worked at the school and I found it very difficult to work with them. Although I am open to new ways of doing things, they had a way of doing things which didn't, and wasn't, really, fitting in. I wasn't worried about me or my position, it was the way the curriculum was being put over, and I didn't think it was being put over in the best way possible. It just became a battleground and that's not an environment that I like to work in. Those two years would be the worst part of my teaching and Head of Department experience.

Around this time I began thinking "Is this Head of Department job, is it worth all the grief? Do you need this?" I *liked* it, but the question was "Did I need it?" I still had this thing at the back of my mind, and I'd been thinking about giving the Head of Department job up for probably two to three years, when the guy who I was wanting to take over from me said that he was looking at another job. The Headmaster of that school rang me up for a reference and I thought to myself, "Blooming heck, why am I saying all this positive stuff about [*my preferred successor*], I know he's good" and so I went to him and said "Look, I'm showing my hand a lot earlier than I wanted to but I'm thinking of giving up my Head of Department job at the end of the year, would you be interested in it?" I think that's what made my decision. All of a sudden it gave me the opportunity to jump, you know what I mean?

The actual stepping aside and transition process didn't involve things like moving out of offices because [*my successor*] had his office, and I had my office, so we stayed where we were and just swapped titles. Actually, it probably made it a lot easier I suppose. Once he took over my position I thought he was doing a good job, and our relationship was that I was there for him if he needed me or if he wanted to talk about anything, but

at the same time I stepped right back and let him make the decisions. I wasn't there to tell him how to do it! We've all got our own ideas and so long as things are improving, well, it's fine.

I spent another two years fulltime in the school after stepping aside when I was just an ordinary teacher, and I loved it, loved it! I never considered going to another school. I guess I was happy where I was. I took on another junior class so that I was fulltime teaching, and the year nines I really enjoy, you're just moulding those kids. I enjoyed my job, and teaching is the sort of job that if you don't enjoy it, get out of it!

I don't think the students reacted to me any differently once I'd stepped out of the Head of Department position. I mean if there were any decisions, they just accepted that if I could make the decision I would, and if I thought it was for the Head of Department then I'd say "You need to go to see the Head of Department." The senior management still treated me as a reasonable person (laughter), and in fact, when I finally left the College, the Principal called me back before the beginning of the next term to say "One of the guys within the department has decided to leave, can you come and help us out?" And I still do work there even now.

Interpretation

Embedded within Ted's experience of stepping out of a leadership position there is an interesting combination of reflective thought processes occurring over time, and a sense of suddenness in the act of coming to a decision. He indicates that during a period of some tension within the department he initially began thinking about whether the job was in fact "worth all the grief" and, although this situation is resolved, he continues to be aware that "at the back of [*his*] mind" there is the question, "Do I really need to do all this work?" This thought process continues for some two to three years and in this respect, in making the decision to step aside, there is a backdrop of reflection and a gradual coming to a place of readiness. This moving towards a readiness to step aside however does not in itself seem to be enough to precipitate the final decision. The act of decision-making for Ted appears to be triggered by, and located within, a specific moment during a phone conversation with the Principal of another school. Ted vividly describes having identified (perhaps during the reflective phase of coming to a place of readiness) the person that he would like to have take over from him, should he leave, and then discovering that this person had applied for another job. While giving a verbal

reference to the Principal of the employing school he suddenly has the thought "Blooming heck, why am I saying all this stuff about [*my preferred successor*]?" He becomes suddenly and acutely conscious of the merits of his preferred successor, and that he does not wish to lose him to another school. Consequently Ted immediately makes the decision to announce his intention to give up the leadership position, in order to encourage his preferred successor to stay on. It is with this sense of suddenness, then, that the final decision to step aside is actually made. When considered from this perspective, Ted's experience of the act of relinquishing position involves the elements both of a gradual coming to a place of readiness over time, and a sense of suddenness the final act of decision-making. This 'ready-suddenness' is a central feature of Ted's experiencing of the stepping out of leadership.

Running through Ted's living of both the leadership and the stepping out of leadership experience is a strong thread of shared responsibility. This is evidenced initially, while in the leadership position, in his acknowledgment that "teaching is constantly changing" and his dividing of aspects of the responsibility for curriculum changes amongst his department members saying, "You look after [*area A*], and I'll look after [*area B*]." In organising the planning of the overall teaching programme within the department he notes, "I would deal with the writing of the schemes or I'd give part to [*one of my other department members*] to check it over." When Ted comes to a place of readiness to step aside from his position, again, there is a shared responsibility in that he approaches his preferred successor and says "I'm looking at giving up my HoD job at the end of the year… I [*will*] go and see the Principal, and if he will look at you in favourable way, will you stay on?" There is an invitation here for the preferred successor to choose to accept or reject the responsibility in staying on, while Ted, for his part, offers his commitment to actively take responsibility for facilitating the transition. What is the place of this climate of shared responsibility in the successor's willingness to accept the position and in the subsequent experiencing of the stepping out of leadership? Certainly the preferred successor did accept the position, and despite being ready to "move on" was in fact prepared to wait some eight months before assuming the title. It is interesting that in the event of Ted's actual stepping aside and the handover of positional responsibility, the shared responsibility appears to continue. Ted remarks that although he deliberately "stepped right back" in order to allow his successor to have the responsibility to make his own decisions, "we would constantly talk. I was talking [*area*

B] and he was talking [*area A*], so … I guess in a way … [*in area B*] I still sort of did things the way I saw it, although he was Head of Department, just the same as I [previously] let him do the [*area A*] side, because that's what he knew." This openness of communication and ongoing shared responsibility, Ted confirms, ensured that the experience of stepping aside yet remaining in the same workplace with another occupying his former position "worked well for me." In describing the physical movement of offices around the time of the shift, but what perhaps in a broader sense seems applicable the degree of shared responsibility and ongoing role both before and after the shift, Ted highlights the comfort and ease of the transition in that "we just stayed where we were and just swapped titles."

Finally, a central element to Ted's experience of stepping out of leadership is the awareness of personal values and the seeking to balance these with the requirements of the position. It is clear, for example, that he places a high priority on the importance of family. Indeed, it is this valuing of family life which leads him to return to teaching in the first place from a period of time in another occupational field. Ted cheerfully acknowledges that "I was making more money at it [the other field] but I had young kids, and they were playing sport, and I couldn't be at their sport, so I made a lifestyle type decision, so I went back to teaching." The valuing of family life is also highlighted in Ted's comments that "my sons had a paper run and I'd go out with them and run around" in the mornings, and that "when it came to the holidays I always took my family away … at the very least for a week for the holidays, and Christmas time we'd go away for three weeks." Alongside this valuing of family over the financial incentive of the previous employment however, there is the recognition that the educational leadership position generates pressures of its own. Ted indicates for example that "even though we used to go camping, I would take my books with me and on days when it was raining I would sit down with my books and be writing and sorting out schemes." This provides an indication perhaps both of the degree of pressure associated with the leadership position and the level of commitment required in dealing with the demands of such a position. The intensity of this commitment is further exemplified in Ted's telling admission that "it never really leaves you, you're always … you might be out fishing but you're always thinking about it." In addition, the demands of position are evident in Ted's comment that as a teacher, "you go home and you're knackered, you've had enough of kids and you don't really want to deal with your own kids."

These positional demands then, appear to come into some conflict with his valuing of family and Ted is highly conscious of the need to balance these.

Ted describes the experience of a further seeking of balance of family priorities, money, and time in finding himself at "a stage of life where my kids … [had] got jobs: one was overseas, another one was about to go overseas, and it really was just my wife and I." It is at this time that he begins posing the question "Do I need an extra three grand?" to which the answer seems unequivocally "No I don't – not for all of these hours that I've got to do!" He concludes that "there comes a time in your life when you need to take a bit of pressure off yourself and let happen whatever happens." There are elements here of self-reflection and trust that lead Ted towards taking the ultimate step in seeking a balance of values by stepping aside from his leadership position. This awareness of, and willingness to act on, his values features strongly in his experience of the stepping out of leadership.

Deb

I was Head of [*Department*] at the school, which meant I was responsible for year nine and year ten [*in that subject area*], which covered probably 24 to 25 classes. There were about 300 students in each year level, so altogether I was responsible for about 600 students for that subject. I did the job for five years and finished doing it last year.

When I first arrived the person who'd actually been the Head of Department wasn't running it and the person doing the job had really been a caretaker for that first term. So things had kind of been on hold until someone picked up the job and it was quite difficult in that there were several people, still in the school, who had had the job before me. I felt quite anxious about changing things too much or doing anything other than what had been put in place by people before.

The time allowance for all the responsibilities of the position was only one period a week, so that was 50 minutes. In reality the job took much longer and there were real crisis times. Around the exams at the end of the year, for example, probably a month out from the exam you're getting ready to do it, and there's the organising of the papers, organising the photocopying, and then organising the rooms. After that, of course, there was the report writing – and I had to check that – and all this comes at the same time as the stock-take happens, and getting ready for the following year! So there were times

when there were lulls and I wasn't doing very much at all other than putting cards in text books or something like that, but at other times it was just nightmare full on. It would have been quite nice to have had maybe a couple of days at those difficult times, instead of having an extra period. Even something like not having a form class would have been fantastic because you would have had an extra 15 minutes at the beginning of the day. The other staff were supportive and only too happy to help if I said to anyone "Can you do this?" However, they weren't getting paid for it and they wouldn't be responsible for it, so I didn't ask very much, but I did appreciate their input. In our department we're not the sort of people that are up at the Principal's office, banging on the door – we just get on with it, and so what we've tended to do is that if something needs to be done, someone will help you do it and you just do it. To be honest, while I was in the position I felt like I was just head down, bum up – just getting on with it!

Leading up to my stepping aside from the Head of Department position there was a series of events. Really, it started off with that it was too much to do. I just couldn't keep doing it all, and I didn't feel as though I was doing a good enough job of it either. I didn't like the feeling of not having enough time for finishing things. There were things that I could have done that I didn't. I had to make those choices to put those jobs down the priority list and sometimes I still look at them now and think "Oh, I didn't do a very good job of that!" Things like the filing cabinet that's still got slides in it when I don't think the department has owned a slide machine since I've been there! Also, my daughter started school last year and I just found it very difficult to coordinate her start time with my start time. We organised it, and it works, but at the time it was just hell on wheels in the morning. It was coming up to the end of the year, there were a number of changes internally which meant that I thought it was a good time to make a change, and I was just so knackered from the year before that I thought, "I just can't go 'til the end of another year and feel like this at this stage." I didn't feel it was good for me. I didn't want to leave the school. I didn't have a problem with the school as such, but I just needed something to *go*, in what I was doing.

I talked to my partner about it, and he's always said "If you don't want to do it, don't do it." He's never understood why I've just kept on doing it. I think it was the sense of responsibility – I felt that once I had started the year I just had to do the rest of it. After thinking it through, I thought "Well, OK, the money will be gone, but the money's not a huge amount", so it seemed like a no-brainer. Then I went to the Assistant Principal,

and just told her that this was what I wanted to do. I said "I don't want to leave the school, but I want to take that responsibility away." She was quite shocked, I think, and seemed to feel "Why would you want to give up this 'prestigious' position?" you know, but as soon as I saw her and told her, I just instantly felt better.

Now, having stepped aside from that position, I have one more teaching period. So all that has happened is that I have the same classes pretty much as last year, plus I do one period for a colleague. If I do have to organise my daughter in the morning, I can actually get to school and just go to class. I don't have somebody saying, "Where's the overhead projector?" or I don't feel as if I have to go in and read my emails to see what I have to get sorted for the day. If someone is away, and it's an emergency kind of thing, I don't have to run around and try and find some lessons. So I don't have any of that pressure anymore. And it's much better for the teaching; for the kids as well. I find that at the end of the day, what I used to end up with before was a pile of paper that I'd take from my classroom back to the office and I'd have to do something with it, whereas now I *can* do something with it instead of the pile getting bigger and bigger, and by the end of the week, just chaos! The best part about it is having planned organised lessons. I don't feel as though I'm on the hop, trying to present something, and I like having time to have a think about something else I could do instead of the 'same old'. I can make different material that's more suitable for difficult classes, and so I can manage that behaviour stuff by presenting lessons that engage them a bit better than before. At home I don't moan as much! Sometimes I wouldn't go places because I had things I needed to do. I can remember one occasion when my partner wanted to go to [*another city for a holiday*] and I said, "Well, we can't go [*there*] because I've got these things to do." Or when I did say "Yes we'll go", I took them with me! I think my partner finds me much more relaxed about things and I don't stay up doing ridiculous amounts of work at night.

In terms of the re-appointment process, the new person was appointed as the [*head of a larger management area*], and my management unit became part of the package offered to them, so the new person also took over the Head of Department position without anyone from the school having a chance to apply. It was quite a nasty end of year divvying up of what was left, and people were left doing work but not being rewarded for it. I don't mean to be unkind to the new person – the position warrants 3 management units – but in my opinion, it wasn't really about the subject; it was just the

need to have that management unit for the new person; that number of management units for him. I don't think they really appreciated or really acknowledged that they had to find a good person to do that job. I was really upset because one of the reasons I went to see the Human Resource person earlier was so that somebody who was already teaching the subject in the school could have the opportunity to apply for it – several were perfectly qualified to do the job. So I wasn't happy about that. I don't have an issue with the person who has got the job at all; it was just the process really.

The relationships that I have now with the people that I was working with in the Head of Department position feel similar. I mean, often people will still ask me things, like "Where are the text books?" and at the beginning of the year, for that first three weeks, I was a little bit miffed that perhaps I wasn't getting paid when I was essentially still doing the job anyway because the new person was finding his feet. Now I do less, but help when I can.

Overall, I've not regretted my decision at all. This is the first time I've actually stayed in the school and just reduced the load, normally I move on to another place. But for me there's nothing wrong with the school, there's nothing wrong with the kids, or the distance to work or anything like that, so the only thing that was a problem was the extra work.

Interpretation

Throughout Deb's experience of the leadership position, and influencing the subsequent experience of relinquishment, there is an overriding sense of intensity and an associated relentless busy-ness. This intensity first begins to be indicated as Deb outlines her job description as including developing units of work and organising "the topics that each class is going to be doing in the year … I had input into deciding which teacher had which level of class etc. I was responsible for tasks like text book ordering, maintenance of text books and resources, looking after stocktaking and inventory … looking after the video collection … writing exams at both year levels, checking the reports, and the reports went out twice a year so I did lots of proof-reading." In addition to these specified tasks Deb is carrying an almost fulltime teaching load, with the only time allowance made for her Head of Department responsibilities being one extra 50 minute non-contact period per week. Furthermore, it is important to highlight, that due to ongoing family commitments, there are fixed points to the starting and ending of Deb's

day. As she explains, “with my daughter, I can’t, can’t take her any earlier to [her] school. It opens at 8.30am and I drop her off at a friend’s house at 8am.” Deb then needs to pick her daughter up again at the end of the day and observes that as “[my own] school starts at 8.30am, I get there, get out of the car, and it’s pretty much go!” Deb’s highlighted sense of the need for the compressing of tasks into a finite time-frame begins to become apparent. Associated with this perceived necessity of task compression there is also a sense of hyper-activity or relentless busy-ness in Deb’s work life experience. This is evidenced in her describing of her experience in the Head of Department position as primarily one of being “head down, bum up – just getting on with it!” This sense of relentless busy-ness is further reinforced in Deb’s admission that in an effort to squeeze more into the day “I don’t have a lunch break”, and in her acknowledgement that quite apart from any extra leadership responsibilities “teaching [in general] is quite stressful anyway” and that teachers need to “just chug along and you just do it.” As a final indication of the degree of the relentlessness experienced in just getting the job done, it is telling that Deb feels that even an extra 15 minutes non contact time per day (by the removal of the requirement to have a form class) would be regarded as worthwhile.

To what extent might this level of intensity and relentless busy-ness be experienced as a feature of educational leadership and what might be its impact? Certainly for Deb, to be working in such a ‘pressure-cooker’ environment takes its toll on her professional satisfaction, and indeed her wellbeing. She finds that in attempting to compress the expected range of tasks to be carried out into the limited time available, the single least enjoyable thing about her leadership experience is “the feeling of not finishing things.” This sense of incompletion is experienced for Deb both in not doing things as well as she would have liked and then “go[ing] home and think[ing], ‘Oh I could have done that a little bit better’”, and also in terms of not doing things at all. As she admits, there were “things that I could have done that I didn’t” simply because there wasn’t enough time. The pressure-cooker environment then results in this sense of incompletion which is both powerful and unsettling, and erodes Deb’s job satisfaction to the point where she notes: “I just couldn’t keep doing it all and I didn’t feel as though I was doing a good enough job of it either.” In addition to the loss of job satisfaction, the level of intensity and the pervasive feeling of never getting things finished, leads to an impact on Deb’s physical wellbeing. As she bluntly puts it: “I was just so knackered from the year before

and I thought 'I just can't go 'til the end of another year and feel like this at this stage!' I didn't feel it was good for me." Ultimately, for Deb, there is a coming to a place of recognition that "it was too much to do" in too little time, that the resulting intensity and relentless busy-ness was causing a reduction in her job satisfaction and wellbeing, and that she "didn't want to leave the school … but … just needed something to *go*, in what [she] was doing."

Against the experiential backdrop described above, the stepping aside from the leadership position involves a powerful sense of having released some of the pressure from the situation. There is shown in Deb's description of the moment of announcing her decision to resign, and her subsequent discovery that "as soon as I saw [the Assistant Principal] and told her, I just felt instantly better." In purely practical terms this 'feeling better' and sense of the release of pressure is understandable in the context of Deb having relinquished all of the Head of Department responsibilities while, with regard to her teaching load, she notes that "all that has happened is I have the same classes pretty much as last year plus I do one period for a colleague – I have one more period." Even this extra teaching period that she acquires is in fact planned by the colleague for whom she is taking it. It is apparent, then, that in Deb's stepping out of the leadership position there is a very practical reduction in the relentless busy-ness of her work life through the swapping of all of the leadership responsibilities, plus the 50 minutes allocated for carrying them out, for a single 50 minute teaching period prepared by somebody else.

For Deb, the experience of stepping out of the leadership position involves a significantly positive impact on the feeling of needing to compress tasks into a limited time, and particularly, on her earlier described sense of rushing headlong into the day. Now, having stepped aside, she remarks "I can actually get to school and just go to class. I don't have somebody saying, 'Where's the overhead projector?' or I don't feel as if I have to go in and read my emails to see what I have to get sorted for the day... So I don't have any of that pressure any more."

The release of pressure and reduction in the relentless busy-ness also has a positive impact on Deb's experience of teaching. Having more time, she finds that "I can actually plan [the] lessons really well. Now I know what I'm doing tomorrow, and I know what I'm doing Wednesday." Previously while in the leadership position Deb

admits that "at the end of the day, what I used to end up with before was a pile of paper that I'd take from my classroom back to the office and I'd have to do something with it, whereas now I *can* do something with it instead of the pile getting bigger and bigger." There is a reference here to Deb's earlier expressed dissatisfaction with the sense of not finishing things, and to have more time is not only evidently more rewarding for Deb herself, but she perceives it as also "much better for the teaching; for the kids as well."

Stepping out of leadership allows Deb to step away from the relentlessness of being "on the hop" experienced while in position, and to focus more time and energy on tailoring work towards identified student needs. Not only does she value having time "to have a think about something else [she] could do instead of the same old", and being able to develop new resources, but there is also the suggestion of a positive impact on the classroom relationships. Within challenging classes, she notes, "I can make different material that's more suitable for that class, and so I can kind of manage the behaviour issues by presenting lessons that engage them a bit better than before. Whereas before I might have grabbed a text book and tried to do something, now I've actually got the time to get them something that actually suits them better."

A significant feature of Deb's experience of stepping out of leadership is that while she is absolutely certain about the 'rightness' of her decision, and has no regrets about the outcome, she does have some misgivings around the transition process. In particular, there is for Deb a sense of frustration and disappointment in the playing out of the process of the selection of a successor. This is indicated in her comment that "It wasn't a good experience really. The management unit [from Deb's position] became part of a package offered to the new [*head of a larger management area, who*] … also took over the Head of Department position without anyone from the school having a chance to apply." There is the appearance here of a frustration with the school's pragmatic approach to the selection process which Deb views as centering around resourcing and the allocation of management units, and describes as being not "really about the subject … just the need to have that management unit for him; that number of management units for him."

This systemic prioritising of the need to come to a convenient resource allocation is in contrast to Deb's own prioritising of the importance of finding the best person for the job. While she makes it clear that she has no issue with the person who ultimately does

succeed her, in terms of the process she indicates that "I don't think they [the employers] really appreciated, or really acknowledged, that they had to find a good person to do that job." Furthermore, within Deb's experiencing of the ascendancy of pragmatic resource allocation over person, and in particular the manner in which this resource allocation is carried out, there is no opportunity in the re-appointment process for identified 'good' people already within the department to apply for the position. This is a notable source of disappointment for Deb who confirms being "really upset because one of the reasons I went to see the Human Resource person earlier was so that somebody who was already teaching the subject in the school could have the opportunity to apply for it – several were perfectly qualified to do the job."

It is worthwhile to consider what effect the overall nature of this process of finding of replacement may have had on Deb's sense of the valuing of her own contribution while in the position. Certainly there is the suggestion that if the finding of a successor is seen to be reduced to a pragmatic exercise of resource allocation rather than an active seeking of what's good for the role, then there is, by implication, a devaluing of the role itself. In addition, with Deb's own expectations of suitable internal candidates having the opportunity (and presumably her support) to apply for the position being unmet, there is perhaps also a sense of disempowerment in the way the process is carried out. What place might there be for a person who steps out of leadership in the process of selection of a successor and what impact might this have on the ongoing experience of remaining in the same workplace? For Deb, it seems apparent that this transitional process "wasn't a good experience really" and indeed, ultimately just "quite a nasty end of year divvying up of what was left."

Summary

In presenting the crafted stories of each participant's description of the voluntary relinquishment of the position of leader, this chapter has deliberately sought to honour and maintain the uniqueness of individual human experience. This giving of voice to the experience of leaders who step aside but remain in the same workplace was regarded as particularly important given the current lack of research around this phenomenon. Following the crafted story of each leader, a hermeneutic interpretation has been provided in order to begin to offer provisional understandings of each unique individual experience. In the following chapter, attention will be turned towards a consideration of

the patterns of commonality revealed across the experience of participants, and the essential themes arising, articulated.

Chapter Five: Findings II – The Shared

In this, the second of the findings chapters, there is a moving beyond the uniqueness of the individual experiences of the participants towards an uncovering of shared meanings. These patterns of commonality revealed across the experiential accounts are presented as essential 'themes' (van Manen, 1990) through which the phenomenon of the voluntary relinquishing of leadership position yet remaining in the same workplace may be meaningfully understood. In seeking to give shape to, and make sense of, the phenomenon under study, there is a deliberate focus on pointing to the aspect of the phenomenon rather than the participant, and themes of a-lone-ness, the ready-suddenness of decision-making, a seeking of balance, and the re-turn to teaching are uncovered and presented. An additional theme of the ease of letting go and holding on is revealed, and offered as being of interest for further exploration.

A-Lone-Ness

In making sense of the experience of stepping out of leadership yet remaining in the workplace, there is an uncovering of a theme of isolation, which is entitled here 'a-lone-ness'. In using the term a-lone-ness there is a deliberate emphasising of the sense of distance, separation, and being somehow 'lone' within a collective environment. This a-lone-ness can be experienced as a removal from decision-making, a sense of not being known, and a relational distance within the workplace.

Removal from decision-making

Embedded within the 'stepping out' experience there is an a-lone-ness that is seen in the sense of removal from the decision-making process. Essentially, this experience centres around the isolation from a 'higher' tier of decision makers whose edicts directly affect the leaders' own work, and is perhaps best exemplified in the description:

> All the decision-makers were remote from the school. The people who made the important decisions – I never saw them. As far as I'm concerned, they never came [*here*], and were very unaware of the challenges that we faced. (Interview one)

In other stories, it becomes apparent that this isolation from decision-makers is sensed both in position, as suggested in the experience that "… Principals are often jealous of

their own power and authority, and are unable to hand it on and delegate it to other people except on their own terms" (Interview six), and in the experience of the shift out of leadership position which is characterised for some as one of being "totally and utterly marginalised" (Interview three) by those in power.

There is an indication here of being affected by, yet removed from, this 'higher' tier of decision-makers. The isolation from decision-makers carries with it an exclusion from the ability to influence the decision-making process, and an associated sense of powerlessness expressed as "this is what you've got to work with, you just work with that" (Interview seven). This powerlessness, and inability to influence, is well highlighted in the following description of the leadership role:

> The ability to have the vision and to work towards creating that vision is attractive to me but the reality of the job is that … you won't be able to enact your own visions, you're enacting someone else's vision and that's a very different thing. (Interview one)

The a-lone-ness experienced in simply enacting others visions while in position, without the ability to influence the decision-making process, is also found in the absolute sense of one's "voice not counting" (Interview three) having stepped aside from position. Perhaps unsurprisingly, where voice doesn't count there is a "withdraw[al] from actually making comments, or a contribution, at all" (Interview three), further exacerbating the sense of a-lone-ness.

In addition to being experienced both in and out of leadership position, the powerlessness and frustration of the lack of influence on decision-making is furthermore experienced in the actual transition and succession processes themselves. This is revealed in the process of the appointment of a successor outlined below:

> It wasn't a good experience really. The management unit became part of a package offered to the new [*head of a larger management area, who*] … also took over the Head of Department position without anyone from the school having a chance to apply … I was really upset because one of the reasons I went to see the Human Resource person earlier was so that somebody who was already teaching the subject in the school could have the opportunity to apply for it – several were perfectly qualified to do the job. So I wasn't happy about that. I don't have an issue with the person who has got the job at all. It's just the process really. (Interview seven)

This story points to a strong sense of the frustration of being removed from the decision-making process. The incumbent makes it clear that the frustration lies not with the choice of successor, but rather with the decision-making process, and this because they were unable to "have any input into it" (Interview seven). In the lack of influence on the transitional process of the appointment of a successor, there is a heightened experience of powerlessness and an isolation from decision-makers.

It becomes apparent then that the removal from the decision-making process through isolation from decision-makers, and an inability to influence decisions made while in, out, and transitioning through leadership, contributes to the experience of a-lone-ness.

Not being known

The theme of a-lone-ness is further revealed in the sense of not being 'known' as a person within the roles occupied in the workplace. This lack of awareness or recognition of the personhood of leaders by others, particularly those 'above', is well exemplified in the announcing of the decision to step aside only to find that the senior management are "quite shocked" and ask the question "Why would you want to give up this 'prestigious' position?" (Interview seven). This surprise and lack of understanding exhibited by others around the decision to step aside suggests an unawareness of the human and the personal in this decision, and points to the sense of not being known.

The sense of not being known is also present in the experience of remaining in the workplace after having stepped aside from leadership position. This is perhaps best highlighted in the instance that, having shifted out of the top leadership position and into another in the same workplace, there is an initial experiencing of "almost no recognition of who I'd been, and that was quite strange" (Interview three). In seeking to come to terms with the impact of this lack of recognition, and the sense of having shifted from being known to not being known, there is a process of significant personal adjustment which, tellingly, takes place without the awareness of others as described below:

> So I felt like I was dealing with something that was a very personal thing that others were not even really aware of. Everybody was so aware of the big issues, yeah, so I don't think people … I think even today, people have no idea of why I left. Nobody even really wanted to know! (Interview three)

There is a suggestion here that in the institutional focus on "big issues" there is a losing of the awareness of the person, and indeed, the "very personal" experience of shifting out of leadership. This profound sense of not being known is further heightened in the description that of "the very people who'd been my closest confidantes … none spoke to me for over a year … and that's just to say 'How's it going, how are you feeling?' Nobody said to me 'How are you doing?'" (Interview three). The experience, then, of not being known as a person contributes to the sense of a-lone-ness of stepping out of leadership, and in this example, ultimately results in the leaving of the workplace completely.

Relational distance

Lastly, the collective pattern of a-lone-ness experienced within the phenomenon of the voluntary stepping out of leadership, is highlighted in a sense of 'distance' in relationship with teaching colleagues. In particular, this relational distance is experienced while in position as the maintaining of a gap between leader and other in the workplace, and is exemplified in a sense of guardedness, of a line not be crossed, and of being an outsider.

The relational distance revealed in the guarded nature of interactions with others is described below:

> I always imagined that when I went and sat with the hard-cases in the corner of the staffroom, that they were always slightly on their guard because I was from the admin system. That was what was in my mind. (Interview six)

The perception of others being "always slightly on their guard" suggests a holding back and the impossibility of open, natural communication. There is an experience then of awkwardness of interaction associated with this real, or imagined, being on guard, which in turn points to a distance in relationship. There is a sense perhaps by those interacting of a line which is not to be crossed in workplace relationships, and this is further, and unambiguously, reinforced in the comment that there is "always a slight barrier with working colleagues … a sort of line that you step over with some people but we don't step over perhaps with the majority of working colleagues" (Interview two).

This relational distance is further strongly evidenced in the perception of another leader as being viewed by the older teachers as "very much as an outsider coming into their domain" (Interview one). There is an acknowledgement that this distance in relationship caused some 'issues', and a clear pointing to the potential negative effects of this relational distance:

> A lot of teachers who'd been there a long time had got very used to doing things their own way, some of them have quite unusual beliefs and methods, they'd not been observed, they'd not been trained and it's a bit like a hive of bees that's been left to its own devices for five years. If you go and try and handle those bees, that beehive, they will attack you whereas a hive of bees that's been handled regularly will not attack someone. (Interview one)

The imagery of being attacked by the swarm of bees that is the workplace, certainly carries with it a potent sense of the a-lone-ness of the leadership experience.

While there is an awareness of this a-lone-ness and distance in relationship by the leader whilst in position, it is interesting that in many stories the a-lone-ness appears to be further highlighted in hindsight, once having stepped aside and experienced the positive effects of this on collegial relationship. That the nature of the relational distance associated with leadership position seems more clearly recognisable once it has been lessened is evidenced in the realisation by some that, "I notice now that the [leaders] are seldom in the staffroom; that if you go into the staffroom, you just get hit" (Interview five). Having stepped aside there is an appreciation that "contact with the staff increased … and I could converse more freely" (Interview five). In other stories there has been the discovery that, in stepping out of position, colleagues "have been more honest and said what they enjoyed of my working relationship and style, but it was interesting that they didn't come up and say that to my face when I was in the management role" (Interview two). For yet others there is lessening of a-lone-ness through the experiencing of relationships that are "just more natural" (Interview six).

The Ready-Suddenness of Decision-Making

In coming to the place of stepping aside from a leadership position yet remaining in the workplace, there is an interesting juxtaposition of readiness and suddenness. While in many stories there is an acknowledgment of a 'building up' towards the time of decision, there is yet a suddenness to the finding of oneself in the place of actually stepping aside. This theme of 'ready-suddenness' is revealed in the experiencing of a

moment of coming to 'see' in the decision to step aside from leadership position, and in the instinctive nature of this sudden knowing.

A moment of coming to see

The experience of stepping out of leadership position is characterised by the sudden sense of awareness with which the decision is made. Notwithstanding any contextual preparedness, it is in the suddenness of the moment of coming to see that the actual decision to step out of leadership position is triggered. This is described in one story as having had "this thing at the back of my mind" (Interview eight) for two years as to whether to continue in the leadership role, but that it is not acted upon until a phone call is received from a potential employer:

> The guy who I was wanting to take over from me said that he was looking at another job, and then the Headmaster of that school rang up and I thought to myself, "Bloomin' heck! Why am I saying all this stuff about [*my preferred successor*], you know he's good". (Interview eight)

It is in this moment that there is a sudden coming to an awareness of the determination to step aside, and the person describes finding themselves in a place where "all of a sudden it gave me the opportunity to jump" (Interview eight).

The moment of coming to see is experienced in another story alongside a "sudden sense of déjà vu" (Interview five). Against the backdrop of a number of years in a leadership role involving cycles of pastoral care for the same cohort of students from school entry to exit, there comes a moment of sudden awareness:

> I was back in the cycle of Year 9 again. So there was a new batch of kids at year 9 and the issues which were coming up were the same sort of issues I had dealt with, and I thought, "I'm over this!" [Issues] such as, "I've got no friends", "So and so is picking on me" – you get that at junior levels. I thought, "Oh gosh this is going to happen all over again, I better think about quitting". (Interview five)

This experience of déjà vu and the unfolding of a repetitive future brings with it the moment of coming to see, and it is in this moment that a decision to step out of position is made.

The moment of coming to see is finally, and interestingly, highlighted in the recounting of a situation of physical unwellness. Having described the leadership role as "doing

your people jobs, your student jobs … setting your priorities and then going like mad to catch up on that admin and do the extra" (Interview two), the person then explains that "when I fortuitously injured my shoulder, I had two weeks in [*a*] hospital to contemplate "Is this what I want? Is this what I need?" and came back quite prepared to give up that leadership role" (Interview two).

It is interesting to consider that the suddenness of the moment of coming to see within the experience of stepping out of leadership appears often to be facilitated by an external circumstance. This is exemplified for instance in the phone call, the comment of a student at the beginning of a school term, or the unexpected injury found in the descriptions above. There is a sense in which these external events perhaps act as punctuation marks, somehow cutting through the taken-for-grantedness of regular routine, and creating a space for a moment of heightened awareness. It is within the suddenness of this space that leaders find themselves making the actual decision to step aside. There is also a suggestion that these events are welcomed or fortunate and perhaps even, that without them, the decision to step out of leadership position may not have been made when it was.

An instinctive suddenness

Embodied in the experience of the suddenness of finding oneself in the place of stepping out of leadership position, there is an aspect of instinct, and reliance on non-conscious ways of knowing, as exemplified in the following description:

> I didn't plan to resign when I did. [*The Principal*] … asked me if I wanted to resign and I said "Yes!" I just couldn't hold back. I didn't plan to say yes, but when she said that, I said yes … She said "Would you like to be a teacher here?" and I instinctively said "Yes, I'd love that", without even thinking about it. (Interview one)

Although this story earlier indicates a build up of much higher than expected student numbers, insufficient staffing and an "increasingly stressful situation" (Interview one), it is the element of unplanned instinctiveness which informs the final decision to step aside from the leadership position. It is clear that the decision is not premeditated at the conscious level, and it takes the question from the school principal to access the wisdom of instinct and elicit the sudden knowing apparent in this decision. Moreover, this instinctive suddenness of decision-making is further reinforced in the person's intuitively choosing to remain within the same workplace as a teacher, "without even

thinking about it" (Interview one). This seemingly 'unthinking' aspect of the suddenness of the decision-making process holds no suggestion of being 'un-wise', but rather points to an appeal to a wisdom other than that solely reliant on conscious rational thought.

This involvement of the instinctive and unthinking in decision-making finds an interesting resonance elsewhere in the decision to step aside being described as a "no-brainer" (Interview seven). Thus it begins to become apparent that the making of such a significant decision may not rest entirely within the realm of the conscious and the premeditated, and indeed, that there is a coming to the fore of the non-cognitive domain, and an accessing of instinct and intuition in the suddenness of knowing.

A Seeking of Balance

One of the central themes in making sense of the experience of the voluntary relinquishment of leadership is that of balance. It is interesting that in many stories there is a point at which the leader begins to use the language "Do I need this?" (Interview eight), "Is this what I need?" (Interview two), and "I don't need this" (Interview five). There is an implication here, of needing something other than what is currently being experienced, and in the stepping out of leadership there is a sense of an altering of the balance in order to meet these needs. This aspect of the seeking of balance is evidenced particularly in the areas of personal and professional priorities, time, stress, and money, and is experienced as having an impact on one's way of being.

Personal and professional priorities

The stepping aside from a leadership position may be experienced as a balancing of personal and professional priorities, such as those of family, social relationships, and ambition. The priority of family responsibility, and a seeking of balance in the stepping aside from leadership, features in a number of stories and is exemplified in the description below:

> My daughter started school last year and I just found that very difficult to coordinate her start time with my start time … at the time it was just hell on wheels in the morning, and I didn't like just arriving at school and teaching straight off, you know? And I didn't want to leave the school. I didn't have a problem with the school as such, but I just needed something to *go*, in what I was doing. (Interview seven)

While it is clear that there is a prioritising here of a daughter's schooling arrangements, there is, however, also an awareness of a professional priority, expressed as the unwillingness to arrive at school with 'insufficient' time before classes began. The need for a seeking of balance is made apparent in the acknowledgement of not wishing to leave the school but 'needing something to go', and ultimately what does go is the position of leadership.

In addition to the balancing of family and work priorities within the constraints of time, there is also a seeking of balance in a wider sense between family priorities, and the apparent prestige of a leadership position. This is summed up in the following description of the decision to step out of leadership:

> I have to say that my personal life has an impact on my decision-making, yes … I have responsibilities at home and also I have the whānau responsibilities, dependent family responsibilities, so they have a priority for me. So when it comes to looking at do I want extra money, and extra kudos, and extra power, if it doesn't suit me, no! (Interview two)

The aspect of a balancing of personal and professional priorities in the stepping out of leadership is further revealed in the area of social relationships. There is an indication, first of all, that work is not expected to provide, or regarded as a substitute for, an external social life. As expressed in one story: "I've got a life outside so … I don't need the company to fill up my social life needs, that wasn't really an attractive thing" (Interview one). Moreover, in the build up to the stepping aside from leadership there can be a coming to an awareness of a sense of a lack of balance in the area of social relationships associated with the demands of the position:

> I would find myself thinking, "Oh I can't go out or I can't do this" … I realised my friendships were – it was impacting on the amount of time I spent sometimes with other people who I would normally have spent more time with. (Interview four)

Finding oneself in a state of imbalance with regard to social relationships is further described in another story as provoking a reconsidering of the personal and professional priorities, and the desire to seek an altered balance:

> The demands got excessive. There was no time, there was no personal time to relax, swim, to go for a walk … I lost contact with people, so that really pushed me to think "Well, what do I want next year?" (Interview two)

A further area in which there can be an experiencing of the balancing of priorities in the stepping out of leadership is that of ambition, and its importance in personal and professional decision-making. In several stories there is an overt reference to the place of professional ambition in the stepping out of leadership, and specifically that there is a seeking of balance through decision-making which reflects the lessening importance of career, and a greater emphasis on lifestyle. This is perhaps most clearly highlighted in the following description:"I've made decisions that suit me personally as to how I want to spend my time and the emphasis I want to put on ambition or career, and the emphasis I want to put on personal life choices" (Interview two). The re-prioritising of the emphasis on personal life over professional ambition is elsewhere couched in terms of enjoyment and 'taking it easy'. The intent to seek an altering of the balance in this regard, through the stepping out of leadership, is evident in the comment "So I thought, you know, I'd just enjoy myself, take it a wee bit easier and have some more time for myself" (Interview five). This sense of re-balancing priorities in favour of enjoyment rather than career ambition is further reinforced below:

> There comes a time in your life when you want to just take it easy, have fun, enjoy what you're doing. So there comes a time in your life when you need to take a bit of pressure off yourself, and let happen whatever happens. (Interview eight)

There is an indication here of a 'time' of coming to an awareness of a movement in personal and professional priorities. This time of re-prioritising may of course be regarded as a time of life in terms of age, but it is noted that a wider conceptualisation may be applied. Indeed, it is suggested here that this 'time' be considered as a period of review, which may occur at a variety of ages and life-stages, of the importance of one's career ambition in comparison to other personal priorities. In seeking to balance priorities through the stepping out of leadership position there is also an indication of needing to be prepared to accept the implications of a reduced focus on professional ambition.

Time, stress and money

The stepping aside from leadership position may also be experienced as a re-balancing with regard to the value placed on time, levels of stress and the financial reward associated with occupying the leadership position. Many stories point to a sharply

defined trade-off between money and the time required to be spent in carrying out the leadership role. This is strongly exemplified in the description below:

> I kept saying to my wife "I only get an extra three grand for this bloody work! Do I need an extra three grand? No I don't! For all of these hours that I've got to do" … I don't know what it is now but I think the hours that you put in are not paid for. (Interview eight)

The trade-off experienced here is unambiguously described as being between "all these hours" and "three grand". It is clear that there is a sense of imbalance with regard to the time spent and financial return, and that in the seeking of balance through the stepping out of leadership there is a giving up of money in favour of time. This re-balancing of money and time is further highlighted in the following account, outlining the reasons for the relinquishing of position:

> I should say the financial thing is another factor. It was, I can't remember the – some people are good at remembering what they were paid – but before tax, I was getting somewhere between $3,000 and $5,000 extra, but after tax, for all the hassle, it was hardly worth it you know, for a couple of thousand you know. I'd rather take the cut and spend some quality time. (Interview five)

In stepping out of leadership there is also an experience of the balancing of money and levels of stress associated with the position. This is thrown into sharp relief in the comment that "no money on earth can pay you for the stresses of the job, it's a very stressful job" (Interview three). It is apparent here that in the leadership experience, the value placed on money is unequivocally lower than that placed on the implied reward of 'quality of life' and, that in the seeking of balance with regard to stress, money would never suffice as a reason to remain in position.

In other accounts the relinquishing of leadership position yet continuing to teach is described in quite pragmatic terms as a re-balancing which involved, for instance, "10 percent of the stress and 75 percent of the salary" (Interview one). That this seeking of balance through the preparedness to give up income, in order to reduce stress, was experienced as being worthwhile is attested to in the same story in describing the trade-off in the shift out of leadership as being a "a great deal and I was very, very happy" (Interview one).

Way of being

The central theme of balance, as uncovered in making sense of the human experience of relinquishing yet remaining may, in addition, be extended to an impact on one's 'way of being'. The notion of a way of being is used here in the sense of a person's "being in the world" (Giles, 2007, p. 11), that is to say, 'how' one is connected with, and in relation to, the world, rather than the rationalised articulation of one's thinking about life. While the specific examples are varied, this shift in one's way of being through the stepping out of leadership reveals itself as an essential aspect of the phenomenon under study.

In some stories, the pre-relinquishment way of being may best be described as "swamped" (Interview four) which conjures up associated images of being inundated with a weight of water, drowning, and of being unable to breath. This is perhaps confirmed in the further description of the experience while in leadership position as "not living my own life" (Interview four). In stepping aside from the leadership position there is a significant shift in the way of being, and an apparent re-gaining of influence as indicated in the sense of "moving back into control mode and reclaiming my own life" (Interview four).

One's way of being, while in the leadership position, is further revealed in other stories, as "always being on the hop" (Interview seven). This, with the powerfully described attendant "feeling of not finishing things" (Interview seven) suggests a state of frustration and uncertain influence. Again, following the relinquishment of the leadership position, there is evidence of an altered way of being as shown in the acknowledgment:

> What I used to end up with before was a pile of papers that I'd take from my classroom back to the office and I'd have to do something with it, whereas now I *can* do something with it instead of the pile getting bigger and bigger and by the end of the week, just chaos. (Interview seven)

In yet other stories there is a sense of being "on the treadmill" (Interview six) while holding a leadership position. That this way of being can represent a state of hollowness is made evident in the reference to a role consisting of "remorseless administrivia … those very wearying tasks" and a sense of having "not made progress" (Interview six) by staying in the same role for a significant number of years. In stepping aside from the leadership position, however, there is the experience of a shift in the way of being:

> One of the things I have found very interesting since I retired, has been the appointment of new Principals and Deputy Principals in the School and I have found that I have played very influential roles in that. So much so that when the last Principal was appointed, I was co-opted onto the Board of Trustees to act in that role and I think I played a pretty crucial role in the appointment of the current Principal. I found that very satisfying. (Interview six)

It is of interest here that the influence exerted, having stepped out of position, appears to be greater than that while on the treadmill of being in position, and that the story describes an accompanying sense of 'being' satisfied which seemed lacking prior to relinquishment.

While the exemplars above point largely to the phenomenon of stepping out of leadership position yet remaining the workplace being experienced as a shift towards a 'better' way of being, this was not always necessarily the case. This is revealed particularly strongly in one instance of a leader experiencing a sense of being "hugely affirmed" and "involved in everything" (Interview three), while in the position of leadership, but describing a rather different way of being having stepped aside:

> I went through a terrible identity crisis and I think that would be one of the biggest things that happened to me in stepping down … I just questioned who I was. Who am I? Who am I at work, I've always been so secure in who I am and how I operate and all of a sudden, it's not working like it used to. (Interview three)

There is a clear indication here of a shift in the way of being from a state experienced more positively, to one which is experienced less positively. It is suggested that this may be linked to a questioning and renegotiation of identity, and appears to provoke an insecurity in the way of being.

While there seems to be a pointing to an impact on one's way of being both 'for better' and 'for worse', there does in both cases appear to be a circling around the significance of the ability to influence, or lack of, in the nature of this impact.

Overall, in giving shape to the experience of the relinquishing of leadership position yet remaining in the workplace, it seems that there can be a seeking of balance with an associated impact on one's way of being.

A Re-Turning to Teaching

A fourth theme revealed in the experience of stepping out of leadership position yet remaining in the workplace is that of the very potent sense of a 're-turn' to teaching. The term re-turn is used here to emphasise a shift in focus, a redirecting of being, and a sense of turning to face teaching more fully once again, rather than simply implying a physical change in job description or hours worked in the classroom. This experience may be regarded as having links to the previous theme of the seeking of balance but is articulated here as a theme in its own right on account of both the strength and universality of its embodiment in participant stories. This sense of re-turning to teaching, while apparent within all the stories, is interestingly exemplified in the experience of having maintained exactly the same teaching component throughout the holding, and stepping out of, leadership position, and yet still describing teaching as "the most wonderful thing to be *back* in" (Interview three). This points to the experience of re-turning as something other than just a change of job description in the shift from leadership position to teacher, and indeed, although the teaching hours themselves have not changed there is the suggestion of a very positive sense of turning back to something pleasurable. The resoundingly positive nature of the experience of re-turning to teaching is further highlighted in the comment that in stepping out of leadership position, the "greatest joy has just been the simple pleasure of teaching" (Interview six). These aspects of simplicity and pleasure in the re-turn experience bear further exploration.

The simplicity of re-turn

Embedded within the phenomenon of stepping out of leadership there is an experience of a regaining of simplicity evident in the description of re-turning to being "just an ordinary teacher" (Interview eight). It is important to highlight, furthermore, that this 'ordinariness' of being 'just' a teacher is widely welcomed, as expressed in another story: "just to be a teacher, it's great!" (Interview three). This re-turning to an unencumbered simplicity of teaching is revealed in a reduction of responsibility, and an increase in autonomy, having stepped out of leadership. One story exemplifies this well in describing the change in 'first-thing-in-the-morning' processes:

> It's just that now … I can actually get to school and just go to class. I don't have somebody saying, "Where's the overhead projector?" or I don't feel as if I have to go in and read my emails to see what I have to get sorted for the

> day. Another stressor was 'relief'. If someone was away, and it was an emergency kind of thing, I would have to run around and try and find some lessons. So I don't have any of that pressure any more. (Interview seven)

In this description there is a clear pointing to a reduction of the responsibility, and pressure, of having to "run around" to get things organised, and instead the re-turning to being able to "just go to class". There is also a sense here of the leadership position involving an element of a lack of direct control, or a necessity to be reactive to external circumstance. In the re-turn to the simplicity of teaching there is a suggestion of a re-gathering of control in not feeling as if one has to wait for a crisis to happen and then respond to it.

The reduction of responsibility experienced, and the welcome simplicity in re-focusing on 'just' teaching, is also represented as a decrease in night-time worry as indicated in the following description of the joy of stepping out of leadership:

> Just being in a classroom, just thinking about your classes, not worrying about administrative systems. Just lying in bed at night thinking, yeah – that class are doing [*xyz*] tomorrow – OK, and working out a strategy as you're going to sleep and trying it out the next day. So that's been enormously satisfying! (Interview six)

A further and final experience of re-turning to the simplicity of teaching is found in the sense of autonomy regained. This is made evident in one story in the telling comment that "I had a very clear image of what a wonderful sense of total autonomy it was being in my own classrooms" (Interview four). In another, the autonomy regained and simplicity experienced in the re-turn to teaching is highlighted in the description of it as being a breath of fresh air:

> Having had all that responsibility for 400 students, all the teachers and everyone's problems, and sort of from no support to actually being responsible for myself and a small group of students, was a breath of fresh air. (Interview one)

There is the suggestion here of having stepped away from the 'staleness' of something unpleasant, and in particular, that this shift was from the responsibility and complexity of dealing with everyone's problems without a sense of adequate support. The reduction of this leadership responsibility, and the greater sense of autonomy in being able to make decisions solely for oneself and one's class, has a freshness and simplicity about

it. Indeed it is explicitly acknowledged that in the welcome-ness of the re-turn to teaching, "the autonomy, the job satisfaction, and variety are the three things I love … I'm still struggling to find another job which provides those things" (Interview one).

The pleasure of re-turn

In further exploring the theme of re-turning to teaching, an aspect of an overwhelming sense of pleasure is also revealed to be associated with this re-turn. This pleasure is made plain in the descriptions of being able to redirect attention more fully towards teaching as "a very happy time, just everything about it" (Interview four) and "a true blessing" (Interview two). On further reflection it becomes apparent that in the pleasure of re-turn there is a pointing to an original passion for teaching and, in the stepping out of leadership, a sense of reclaiming this passion.

Several stories contain the overt acknowledgement that "teaching is my passion" (Interview four; Interview six), and give further weight to this in a practical sense in describing the deliberate retaining of a teaching component while in a leadership position. As one person indicates, "Right through my whole administrative career I had always taught at least two classes, and I had always made that a condition" (Interview six). In another story, the passion for teaching is further demonstrated in the clarity with which it is indicated that, having accepted the leadership position, there is no desire or intention to accept any further level of leadership responsibility:

> I kept classes because of how much I loved teaching and the students, the positive student relationships. I didn't want to be Deputy Principal or Principal because then I would have lost out on the teaching. (Interview four)

It is clear here that the strength of the original passion is such that the price of promotion, in terms of the cost of giving up teaching, would be too high.

While the passion for teaching is revealed both overtly, and by implication in the ring-fencing and maintaining of a teaching role while in leadership position, it is of particular interest that the stepping out of leadership can be experienced as the pleasure of a passion reclaimed in the re-turn to teaching. This is borne out in many stories and specifically highlighted in the language of 'love' frequently used to describe the re-turn to teaching:

> Then it was another two years when I was just an ordinary teacher – loved it, loved it! … I took on another junior class and the year nine's I really enjoy, you're just molding those kids. I enjoyed my job and teaching is the sort of job that if you don't enjoy it, get out of it! (Interview eight)

It is striking, yet perhaps unsurprising, that love would be used to describe a passion reclaimed and this is further exemplified in another story in which the person speaks of "the things I love about teaching" (Interview one), and in fact accepts the opportunity to re-turn to teaching by saying "Yes, I'd love that" (Interview one).

This sense of passion reclaimed, and the pleasure of a re-turn to teaching, appears strongly embedded in the stepping out of leadership experience. It is perhaps important to note that all the leaders in the present study were initially employed as teachers before occupying the leadership positions that they have subsequently stepped aside from, and that this may influence the sense almost of 'homecoming' in the way participants speak of the re-turn to teaching. As one story expresses so well: "who I really am at heart, is a teacher. And I love that and that's enough for me" (Interview three). It is also interesting, given the strength of the passion for teaching revealed, to consider to what extent the shift from a leadership position may be a deliberate stepping away from position, and to what extent a conscious stepping towards teaching.

The phenomenon, then, of stepping aside from leadership position yet remaining in the same workplace may be experienced as a welcome re-turning of attention towards classroom teaching. This re-turning to teaching embodies a sense of re-turn to a formerly appreciated simplicity, and the pleasure of a passion reclaimed which transcends the individual contexts participants find themselves in.

The Ease of Letting Go and Holding On

In describing a shift out of leadership, the stories embody the experience of a stepping from the known of former position into the as yet unlived space of what comes next. This space is opened by the relinquishing of position yet remaining in the workplace, and as such, is essentially concerned with the seeming paradox of relinquishing yet remaining, leaving but staying, and letting go while holding on. There can be a sense of tension and a degree of uncertainty within the experience of letting go and holding revealed, and indeed, the stories point to a theme of ease, and dis-ease, in the living of this tension. In using the words ease and dis-ease here, there is an intention to

emphasise not simply the everyday reading of the terms as might be reflected in a question such as “How easy is it to step out of leadership?”, but rather to capture a deeper sense of human wellbeing as it is embodied in this experience. In addition, it is important to note that 'dis-ease' as it used here is not proposed as being the complete opposite to ease, or indeed the absence of ease, but instead as representing varying degrees of awkwardness and discomfort in the overall experience of holding on and letting go.

Tension and uncertainty

In stepping out of leadership yet remaining in the workplace there can be both a sense of tension in the act of letting go of aspects of the former position while holding on to others at the same time, and a degree of uncertainty in stepping into the unlived space where these tensions will be played out. This tension is particularly well exemplified in the comment “I think once you’ve been in that position of leading it’s hard not to lead, hard not to lead, and what did happen was that some staff still looked to me for leadership” (Interview three). There is a very real sense of struggle revealed here, and the suggestion that this tension in letting go and holding on can come both from within and without. The experience that once one has held a position of leadership it’s ‘hard not to lead’ points to an internal, and deeply personal, struggle involved in what is let go of, and what is held on to, in the stepping out of position. There is a very potent sense that the leader is aware of the necessity of an internal re-adjustment process, having relinquished the leadership position, but that this is by no means easy. The experience of dealing with this inner tension of letting go and holding on is further reflected in other stories as a conscious “step[ping] right back” (Interview eight) from decision-making, and a careful avoidance of passing judgment believing “there’s nothing worse than having someone say ‘That’s not the way I used to do it!’” (Interview four).

The tension in letting go and holding on appears not only to originate from within but is also experienced as originating from outside of the leader themselves, through the expectations of others. This is evident in the description that despite having stepped aside from position, there can be those in the workplace who continue to look to the person for leadership. This external pressure to continue to carry out aspects of the former position, without in fact holding the position, can add a further tension to the process of letting go and holding on as expressed in some stories in a sense of

frustration or being "miffed" (Interview seven), and in the experience of "divided loyalty" (Interview three). The place of the expectations of others in the ease of letting go and holding on is further developed in the subsequent sections.

In the stories of the stepping out of leadership position yet staying in the same workplace there is a description of a need, once having made the decision, to "let happen, whatever happens" (Interview eight). This captures a sense of the unknown ahead, and points to one's stepping into an open space which cannot be fully known as it has not yet been lived. Thus, there is a certain uncertainty in the stepping out of leadership – surrounding not the clarity of the decision itself, but the experience of stepping into a space which can only be charted by anticipation, and within which, these anticipations may or may not come to pass. This uncertainty present regarding the alignment of anticipation and reality in how the tensions of letting go and holding on might be played out, can be experienced as an ease of letting go and holding on, a dis-ease of letting go, and a dis-ease of holding on.

An ease of letting go and holding on

The stepping out of leadership position yet remaining in the workplace is revealed in some stories to be experienced as an ease in living out the tensions of letting go and holding on, and the coming to pass of the anticipated. This sense of alignment between the anticipated holding on and letting go, and the 'reality', may be found within the lived experience of holding on to a leadership role despite having let go of former title, the sense of stepping out of position as having made a mutual exchange, and in the experience of an unambiguous and distinct letting go of all to do with the former leadership position.

The ease of letting go and holding on, as experienced in the maintaining of an ongoing leadership role despite having stepped aside, is strongly indicated in the following description of the voluntary relinquishment:

> It's still slightly tainted because I'm still on the management team … so it's not a complete stepping into a teaching role and I guess that that suits me … I still like the idea of what's new in education, what's happening, what we can do better, what's our product, what are our possible products, and they're all sort of management decisions, so I still like being part of that. (Interview two)

There is a very clear sense here of holding on to a leadership role, and of anticipation fulfilled, within the 'tainted' stepping out of position. This story speaks further of being able to maintain "an interest in where we're going and what we're doing" (Interview two) through an involvement with the management team, while what is let go of appears simply to be the unwanted "petty administration tasks which seem to intrude" (Interview two) and were attendant to the leadership title.

The ease of letting go and holding on is further exemplified in the description of the former incumbent and successor having "stayed where [they] were and just swapped titles" (Interview eight). As the preferred successor is appointed from within the same school and the same department, and having already divided up the teaching and curriculum responsibilities, stepping into the space of the relinquishing of leadership position is largely experienced as having made a swap. What has been let go of is leadership title, and while there is the acknowledgement of having "stepped right back and let him make the decisions" (Interview eight), there is yet a strong sense of continuity and ongoing responsibility with regard to role. The teaching role is held on to and, perhaps importantly, as it is in a specific area which is not identical, but complementary, to that of his successor, there is a maintaining of a consensual subject related autonomy:

> [*My preferred successor*] and I were on the same page because he was on the [*subject area A*] side and I was on the [*subject area B*] side. We would constantly talk. I was talking [*subject area B*] and he was talking [*subject area A*], so … I guess in a way … in [*area B*] I still sort of did things the way I saw it, although he was [*The Leader*], just the same as I had let him do the [*area A*] side, because that's what he knew. (Interview eight)

It is interesting to note that despite the letting go of title, there is the highlighting here of a holding on to a strong tradition of dialogue between the former leader and successor. It is apparent that this 'constant talking' was taking place before the stepping aside from position, and that in stepping into the space created by voluntary relinquishment, this dialogue continues with the new leader described as seeking input by asking:

> "Hey, what do you think about this?" So I'd give him my thoughts and he would go away and make whatever decision it was from there. Yes, it worked well for me, in fact, several people there said, "Wow, I didn't think you'd be able to just step back the way you have." (Interview eight)

Within the experience of relinquishment it is revealed that coming to terms with the tensions of what is to be let go of and what is to be held on to, and indeed the fulfilling of anticipation, thus may take place within a context of mutuality and exchange.

A final example of the ease of letting go and holding on in the relinquishment of position is offered in the experience of a deliberate and distinct letting go of role as well as the former title. This is exemplified in the following description:

> One of the great glories I've found about retiring from my role, is that I've made myself certain conditions. Like they came to me and said "You'll take some management units for running this" and so on … No management units – I want no authority! I turned my back on all of that. (Interview six)

There is a powerful sense of actively ensuring that in letting go of a title there is a corresponding, and complete, letting go of the associated role. This anticipation is made abundantly clear to those who might have sought it to be otherwise, and that it is described as a 'glory' certainly suggests that it has been fulfilled. In another story, the shift from a position of fulltime leader with no teaching component, to a position of fulltime teacher with no formalised leadership role also embodies an ease of letting go and holding on. The transition is described as being "overnight, almost" (Interview one) and the completeness of the letting go is apparent in the remark "once I'd turned up in the staffroom and put books on my desk, I was just a teacher" (Interview one). There is little suggestion here of an unresolved tension either through the unfulfilled anticipation of holding on to any component of the former leadership role, or of components continuing to 'stick', unwanted or unanticipated due to the expectations of others. This sense of the 'cleanness' and completeness of letting go is interesting in light of the very positive nature of the relinquishing and remaining experience described in this story.

A dis-ease of letting go

In further exploring the tension and uncertainty in letting go and holding on it begins to be revealed that there can also be an experience of a dis-ease of letting go. This is best made evident in the description below where there is a voluntary relinquishing of position, yet the experiencing of a letting go and holding on that is found to be rather less so:

> I had assumed, and incorrectly so, not that I would necessarily hold management portfolios – because I had chosen not to – but I had assumed

> that I would still be recognised perhaps for some of the experience that I had had, particularly in the role that was relevant to decisions that needed to be made. (Interview three)

There is a sense, here, of letting go of more than expected. Indeed it is made explicit that assumptions were held around what it meant to relinquish position yet remain, and that at least some of these were experienced not to hold true. In particular, there is a failure to be recognised for one's previous experience. This notion of recognition of experience, suggests an ongoing role in offering input to decision-making processes, and it is this role which is experienced as having been let go of, unanticipated. Comments like "I was never consulted on [*X*] again" (Interview three), and "they never approached me and said 'What do you think?'" (Interview three), further illustrate the sense of an involuntary loss of role, with the expectation of holding on to this very aspect of role made apparent in the comment "I just thought they might be collegial, that's where I thought it would happen" (Interview three).

There is an indication here, too, of the place of the expectations of others in this experience of the tension of letting go and holding on. In particular, there is the suggestion that the expectations of other leaders in the workplace around what the former leader would *not* do, having stepped out of position, appear to be implicated in the sense of dis-ease of letting go. In living through the uncertain space following the stepping out of leadership, then, the unanticipated letting go of role is experienced as an unwelcome shift from "making a big contribution … to making no contribution at all" (Interview three), and provokes a strong emotional response: "I was gutted my experience was not called on" (Interview three). The sense of dis-ease is so potent in this experience that the leader comes to the conclusion "the price you pay for picking up the role in the first place is that you have to leave if you step out of it, you can't go back and work within the institution … tragically, it would have been better to have left immediately!" (Interview three).

A dis-ease of holding on

A final experience of the tension of letting go and holding on in relinquishing a position of leadership, is that of a dis-ease of holding on. In one story that exemplifies this, the anticipation regarding the relinquishment of position is clearly enunciated in the resignation announcement: "I said I don't want to leave the school, but I want to take that responsibility away" (Interview seven). The responsibility referred to is that of the

role associated with the leadership position and yet in stepping into the space following relinquishment, there is the discovery that "often people will still ask me things, like 'Where are the text books?'" (Interview seven). There is a strong indication here once again of an experience of dis-ease and of the anticipated not coming to pass. More specifically, in living out the tension of letting go and holding on, there appears to be a letting go of title but the finding of an initial involuntary retaining of the role. Moreover, this inability to step away from role, due to the ongoing expectations of others, is experienced as unwelcome and causes a degree of frustration as further highlighted below:

> At the beginning of the year, when I was doing the work anyway, I was a little bit miffed that perhaps I wasn't getting paid or whatever for that first three weeks when I was essentially still doing the job anyway. The new person was finding his feet ... but you know, there wasn't an acknowledgement of that, so I still had to do all that work, and I still now do a lot of that. (Interview seven)

It is clear in the description of being 'miffed' that this unanticipated holding on to role is not welcome, or necessarily comfortable. In addition, the frustration of the anticipated not coming to pass is further exacerbated by the sense of a lack of acknowledgement of the ongoing role being played. An initial response to the frustration of ongoing demands one thought had been left behind might be to say "Well I don't know, and I don't care anymore" (Interview seven) and certainly, in this story, there is an arriving at the position of "I do less, but help when I can" (Interview seven).

Thus, it seems, there can be a period of a necessary re-iterating of the original relinquishment of leadership position, and an active reinforcing of the anticipation surrounding what will be held on to, and what will be let go of, in the making of this decision. There is a sense here of needing to protect or defend the act of voluntary relinquishment from the encroachment of the expectations of others in order to retain the intent with which the original decision was made.

There is much to be gained in the consideration of the tension of letting go and holding on in the stepping aside from leadership, and the place of anticipation in the ease and dis-ease experienced offers interesting possibilities for further investigation.

Summary

In seeking to make sense of the experience of voluntarily relinquishing position yet remaining in the workplace, this chapter has moved beyond the uniqueness of individual stories to uncover essential themes which show as shared patterns within the experience. To this end, the chapter has maintained a deliberate focus on pointing to the aspects of the phenomenon under study rather than the participant, and five major themes entitled a-lone-ness, the ready-suddenness of decision-making, a seeking of balance, the re-turn to teaching, and the ease of letting go and holding on, have been articulated. In the following chapter aspects of these themes are further explored, and discussed with reference to existing literature.

Chapter Six: Discussion of Findings

This chapter considers the essential themes that arose in response to the research question "What is the lived experience of the voluntary relinquishing of the position of leader, yet choosing to remain within the same educational workplace?", and draws upon relevant literature to explore particular findings. The discussion in this chapter is structured into sections reflecting the five major thematic groupings articulated in Chapter Five, namely those of a-lone-ness, the ready-suddenness of decision-making, a seeking of balance, the re-turn to teaching, and the ease of letting go and holding on. It is noted that while the aspects of the experience are discussed separately, they are lived in an integrated manner, and in addition, that the length of each section presented here is representative of the opportunity for the discussion of the theme with, and beyond, the literature rather than an implication of relative importance. Indications are provided of where these findings support those of earlier studies in the literature, and where they diverge or offer previously undocumented understandings.

The Experience of A-Lone-Ness

The first theme to be discussed is that of isolation, both before and after stepping out of leadership position, and named here as a-lone-ness. As previously indicated, this theme seeks to highlight the sense of distance, separation, and of being seemingly 'lone' within a collective environment. This a-lone-ness was revealed in stories that point to a sense of removal from decision-making processes, of not being known as a person within the organisation, and of a relational distance that is felt with teaching colleagues. The findings of this study both support and amplify those of earlier studies alluding to isolation as an aspect of the experience of being in a leadership position, and notably, go beyond previous research in offering understandings of the experience of a-lone-ness having stepped aside from position.

That isolation may be experienced in relation to decision-making processes and collegial relationships while in leadership is echoed in various ways in earlier research (Bennett, Woods, Wise, & Newton, 2007; Cranston, 2002; Feist, 2008; Harold, 1999; McInerney, 2003). Certainly the findings of the present study would appear to support McInerney's (2003) claim that the context of educational reform had brought "an

approach to decision-making which is at odds with the language of partnership" (p. 65), and his further description of the experience of an increasing "separation of leadership from staff" (p. 65).

This separation of leadership from staff is expressed in other studies as a "critical concern [for] lower levels of visibility and access to the principal" (Harold, 1999, p. 3), or indeed, from the leaders perspective, that "they were virtually alone in endeavouring to achieve the desired goals in practice in their schools" (Cranston, 2002, p. 8). What is interesting however, is that the current findings, while providing further confirmation of an aspect of relational distance in the leadership experience, do not so much appear to indicate an isolation of having to 'go it alone' in decision-making as Cranston's (2002) study would suggest, as one of being 'outside the circle' and unable to influence. This distinction in the findings may be due to the focus of the above studies being predominantly on 'upper' level leaders, namely principals, while the participants of this study were predominantly what may be referred to as middle leaders.

In this light, the current findings of a-lone-ness would seem to be consistent with claims elsewhere of the roles of middle leaders being experienced as involving elements of hierarchical line management and contrived collegiality, and having limited opportunities for significant leadership (Bennett, Woods, Wise, & Newton, 2007; Cranston, 2007; Feist, 2008). The sense of removal from decision-making identified in this study adds weight to the comments by Bennett et al (2007) that the middle leader's role may be experienced as one of being "a receiver of communications" (p. 462) with an emphasis on the 'passing on' of other's messages in both 'upward' and 'downward' directions within a hierarchical structure. This finding is also echoed in Feist's (2008) study of faculty heads, which reported that in being sandwiched "between two layers of management their key management tasks were re-centred on acting as a conduit" (p. 7), and furthermore that in being positioned within a line management model there was a tendency for 'shared' work to involve increasing degrees of delegation and a sense of "contrived collegiality" (p. 8). That middle leaders desire a more influential role in strategic and curriculum/educational leadership decision-making is strongly borne out in Cranston's (2007) recent study of deputy and assistant principals, and it is suggested that the sense of isolation from meaningful decision-making processes found in the current study appears to reinforce and extend the above findings into the domain of the human experience.

While being wary of making substantive claims based on a sample of the eight leaders interviewed in this study, the findings of this study raise an interesting prospect: perhaps, when considered in conjunction with the findings of previous leadership studies in the literature, there is the suggestion that, for upper level leaders, there is an experience of a-lone-ness in finding themselves in a context seemingly requiring increasing decision-making alone, while for middle level leaders there is a sense of isolation in being unable to influence this very decision-making process. This tentative distinction would benefit from further study.

Finally, it is worthy of note that this study appears to go beyond the existing body of literature in revealing a sense of a-lone-ness *after* stepping out of leadership position. No previous research documenting this experience was located, however, given the findings of this and earlier studies indicating a degree of separation between leadership and staff, it would be reasonable to expect that this relational distance might be diminished on relinquishing the leadership position. In the current study this does appear to be the case for many of the participants who report collegial relationships that are more honest and natural, but significantly, not for all. In particular, this study finds that for one participant the experience of stepping out of leadership but remaining in the workplace was one of an intense sense of marginalisation, not being recognised, and 'voice' no longer counting. It is interesting to consider that this participant was the most senior of the leaders in the sample interviewed, occupying a 'top tier' leadership position. One possible explanation for the heightened experience of a-lone-ness having relinquished position may be related to the experience of a relatively greater shift in the ability to influence decision-making. Indeed, the positional relinquishment in this case is described as being a shift from a position of "being involved in everything" (Interview three) to a second tier leadership position, only one step down, but "making no contribution at all" (Interview three). Perhaps the a-lone-ness experienced in having made this shift reinforces the earlier findings of a degree of isolation from decision-making processes experienced in middle leadership. Again, while such an explanation can be only tentative at best, and indicative of a need for further study, the finding itself nevertheless reveals that a-lone-ness is an aspect of leadership experience, and that the relinquishment of leadership position may be variously experienced as both a reduction and a magnification of this a-lone-ness.

The Experience of a Ready-Suddenness in Decision-Making

The second theme for exploration is that of the ready-suddenness of decision-making. Arising from the stories of coming to a decision to relinquish position yet remain in the workplace, this study found that participants experienced an interesting juxtaposition of readiness and suddenness. While often there seemed to be an underlying readiness to move on from leadership position held, there was also the suggestion of an instinctive or intuitive knowing in the suddenness of making the decision. This ready-suddenness offers cause for discussion both in terms of the process and the timing of the decision to step aside.

Current literature tends to characterise the process of the relinquishment of position as being housed within the framework of a discrete and rational set of career stages (Day & Bakioglu, 1996; Gronn, 1999; Ribbins, 2003) or phases of role exit (Ebaugh, 1988; Freese, 2003; Johnson, 2003). The proponents of these stage models imply, or indeed often overtly claim, that "a definite pattern exist[s] with regard to the process individuals experienced in leaving roles" (Ebaugh, 1988, p. 25), and yet interestingly, in some cases, still indicate an inability to come to agreement regarding the final stages of the occupancy of a leadership position (Day & Bakioglu, 1996; Gronn, 1999; Ribbins, 2003). The findings of this study with regard to the ready-suddenness of decision-making do not appear to fully support the suggestion that the human experience of relinquishment may be solely confined within the parameters of overtly deliberate and rational frameworks. In particular, the seemingly instinctive and sometimes unplanned nature of the decision to step aside found here begins to raise questions as to the adequacy of such frameworks.

Several participants in the present study found themselves relinquishing position with an unplanned suddenness as exemplified in comments like "I didn't plan to resign when I did … I didn't plan to say yes" (Interview one). Similarly, the decision to remain as a teacher within the same workplace was described in some stories as being made "instinctively" and "without even thinking about it" (Interview one). These findings, at first glance, would seem to be in direct opposition to Gronn's (1999) contention that voluntary exit is carefully planned for, and that leaders "deliberately make up their minds (usually by retirement or resignation) to relinquish appointments" (p. 40). Furthermore, they do not appear to support those of Freese (2003) who, in his study of

voluntarily exiting school superintendents, found that "exit did not result from a single critical incident or factor, but was indeed the result of a combination of factors generally considered in a gradual, deliberate and explorative manner" (p. 304). At issue here is the seeming contrast in emphasis in the decision-making process of the gradual, the deliberate, and the planned on the one hand, and the instinctive and the sudden on the other.

One potential explanation for this seeming divergence in findings is that the earlier studies referred to have, underscoring their analysis, a theoretical model against which data is collected and claims made. Gronn (1999), for instance, works with his model of stages of headship involving Formation, Accession, Incumbency, and Divestiture while in Freese's (2003) investigation there is the employment of Ebaugh's (1988) role exit theory. Consequently, it is perhaps not unreasonable to imagine that the data would be viewed through the structural lens of the model used, and hence the findings reported accordingly. Following the same logic, the current study, with its experiential focus and hermeneutic interpretation of data may perhaps allow for a more unencumbered capture of the experience of decision-making and a greater opportunity to acknowledge the richness of this experience.

Another possible explanation is afforded if one is willing to regard these two sets of findings, not as being in direct opposition to one another, but rather perhaps as being complementary in nature. That is to say, the decision-making process may indeed involve elements of the deliberate and the planned – as has already been indicated in the 'readiness' found in this study – however, it may be possible that some of this deliberation and planning might occur at a sub-conscious level, and only find 'surface' expression in the moment of seeming 'suddenness' of the decision to step aside. In further discussing this point, it is of value to consider the literature around intuition.

Claxton (2000), in seeking to outline the nature of intuition and its place in professional practice, suggests a defining feature to involve "the appearance of informed action or judgement without attendant thought" (p. 34). It is this very aspect of 'being informed without attendant thought' which reflects so well the decision-making experience described by some participants in this study. Interestingly, however, it is also this same aspect which has evoked the mistrust of contemporary professions underpinned by technical rationalism and thus left them "wary of intuition, disdainful of its

epistemological validity and ignorant or suspicious of both its value and educability" (Claxton, 2000, p. 34). If as, Claxton (2000) claims, "action that is not planned or premeditated, answers that come without reasons, understandings that cannot be clearly and quickly put into words are stigmatized as essentially second rate" (p. 34) then it is perhaps unsurprising in this context that the models which have come to prominence, including those seeking to represent the relinquishment of position, are ones emphasising the rational and the deliberate.

What is worthy of attention here, in exploring the human experience of ready-suddenness found in the present study, is the prospect of an understanding of decision-making which includes both the elements of conscious rational thought *and* a sub-conscious or intuitive contribution. The lived experience captured here certainly suggests these two elements not to be necessarily separated, and it is interesting that elsewhere quantitative research in the field of behavioural science is beginning to provide evidence that "non-conscious biases guide behavior before conscious knowledge does" (Bechara, Damasio, Tranel, & Damasio, 1997, p. 1293). Claxton (2000), furthermore, reinforces the potentially complementary nature of the conscious and the sub-conscious and indeed asserts that "only if we buy uncritically a polarized view of the mind which *a priori* opposes reason and intuition, or reason and emotion, are we forced to take sides" (p. 34). While it is not intended in this discussion that intuition be elevated to the status of a mystical power, and certainly it is acknowledged as not being infallible (Claxton, 2000), the findings of the current study would appear to confirm the place of intuition in the decision to step out of leadership and offer the suggestion that conscious and sub-conscious ways of knowing be regarded as complementary rather than mutually exclusive.

A second aspect of the ready-suddenness of decision-making which bears further discussion is that of the timing of the decision. As highlighted above, this study found the experience of stepping aside to involve a suddenness of decision-making suggestive of a degree of intuition, but what is of additional interest is what appears to be the 'triggering' of the timing of the actual decision. Several participants in the current investigation described an event immediately prior to making the decision which appeared to be experienced as a trigger, and as one participant put it, "all of a sudden … gave me the opportunity to jump" (Interview eight). These triggers included such events as a physical injury, a pertinent question from a senior manager, a phone call from a

potential employer of the preferred successor, and a sudden overwhelming sense of déjà vu spurred by the familiarity of the comments of students. This experience of a trigger in the ready-suddenness of decision-making found in the present study offers some similarity to the notion of a 'turning point' (Ebaugh, 1988) or 'tipping point' (Gladwell, 2000) reported elsewhere.

Ebaugh (1988), in describing the third stage her model of role exit as 'The turning point', outlines this as a specific point in time where a firm and definitive decision to exit is made. She further suggests these turning points may take the form of specific, usually traumatic events; situations that are perceived as being the 'the final straw'; time-related factors; events that provide an excuse or justification; and either/or situations where the consequences of not exiting are regarded as serious. The experience of participants in this study who described a triggered stepping aside would seem to lend support to the scope of some of these categories. The act of being asked to give a reference for an actively job-seeking preferred successor, for instance, is suggestive of an event which provided an excuse for relinquishing position, while a pointed question from a 'superior' or the repetitive comments of students might be regarded as 'the straw that broke the camel's back'. What appears perhaps to be lacking in Ebaugh's (1988) typology are events like those of the situation of a demobilising injury, which create a space for reflection and subsequent decision-making. While the current study does not share Gladwell's (2000) interest in the dynamics of social 'epidemics', his popularisation of the notion of the 'tipping point' and related claim that "change happens not gradually but at one dramatic moment" (p. 9), offers some resonance with the lived experience captured here. If his assertion that "we need to prepare ourselves for the possibility that sometimes big changes follow from small events, and that sometimes these changes occur very quickly" (p. 11) may be applied at a personal level, then the triggered suddenness found in this study would appear to add weight to his analysis.

Finally, it is interesting and important to note that not all participants described the experience of a triggered and definitive point of deciding to step aside. In this respect, the findings of the current study are consistent with those of Johnson (2003) who found only approximately half of the exiting principals in her investigation to describe a particular turning point. This seems to be indicative of the breadth of the decision-making experience, and reflective once again of the difficulties in corralling human

experience into a prescribed model. In the light of the theme of ready-suddenness revealed in this study, it seems possible that while for some the decision appears to have been triggered and time specific, for others it may perhaps be viewed as an outworking of a building 'readiness'. Thus, the experience of stepping aside from leadership position is suggested here to involve aspects both of a readiness *and* a suddenness, but perhaps with varying emphases unique to each individual.

The Experience of a Seeking of Balance

A further theme emerging in this study, and perhaps an unsurprising one in the light of earlier empirical and anecdotal evidence, is that of the seeking of balance. This experience is described as taking place around the re-balancing of personal and professional life priorities including aspects of workload, family, time, stress and money, and the tensions within what might be called the work-work balance. While the findings of this study largely confirm aspects of imbalance identified in earlier research, significantly, they offer an insight into 'the next step', that is to say the act of re-balancing.

Work-life balance

All participants in the present study described the shift out of leadership position yet retaining a teaching position as a seeking of balance with regard to personal and professional priorities. This is consistent with the concern noted in a number of other studies for what has been referred to as work-life balance (Brooking, 2007; Cranston, 2007; Hodgen, 2004; Hodgen & Wylie, 2005; Wylie, 2008), and indeed appears to reflect and extend Wylie's (2008) reporting that only 24 per cent of New Zealand principals view their work and personal life as balanced. Noteworthy, is that this figure represents a decline from an earlier finding of 27 per cent in the same survey carried out in 2004 (Wylie, 2008). Moreover, the current findings add further support to those of Hausman, Nebeker, McCreary, and Donaldson Jr. (2002), who report on the difficulty encountered by American assistant principals in balancing personal and professional lives, and Cranston's (2007) conclusion that New Zealand middle level leaders are very busy people with "the potential for work-life balance tensions to emerge" (p. 28).

More specifically, that participants in this study experienced a sense of imbalance while in a leadership position between workload, and time for family and social relationships, adds weight to Gronn's (2003) claim that "the effect of greediness of work may be to

narrow the life commitment of school professionals, particularly at the risk of engagement in domestic and voluntary activities" (p. 151). This point is also reflected in Cranston's (2007) finding that, of middle leaders who would not seek further promotion, 73 per cent cited lifestyle decisions, such as achieving a work-family balance, as a reason. This offers an interesting corollary to the finding of the current study.

The voluntary relinquishment of leadership position yet remaining in the workplace is also found to be experienced as a re-balancing of time and money, with several participants echoing the comment that for all the hours worked the money was "hardly worth it" (Interview eight). They would rather have more quality time. This finding appears to reinforce those reported elsewhere of perceptions by leaders that salaries are not commensurate with responsibilities (Whitaker, 2003), and indeed that principals, for example, "are increasingly realizing that on a per diem basis, they might actually earn less than their teachers" (Whitaker, 2003, p. 48). While in previous studies levels of remuneration have often been associated with the disincentives for potential applicants in considering applying for higher posts, it appears possible from the current study that salary, and particularly the valuing of time in comparison to salary, may also play a part in the choice to relinquish leadership position.

In considering the aspect of time and workload in the re-balancing experience reported in this study it is noted that the majority of leaders in this study were working 50 hours per week or more, with some working as many as 75 hours per week; similar to findings of previous New Zealand studies (Cranston, 2007; Hodgen & Wylie, 2005; Wylie, 2008). However it is significant that the experience of imbalance described prior to stepping out of leadership position is found to be not solely associated with the physical number of hours worked. This is a point that will be returned to in the next section.

A further re-balancing of the personal and professional highlighted in this study centres around levels of stress. As one participant succinctly put it; "no money on earth can pay you for the stresses of the job" (Interview three). Stress has been widely identified in research literature for some time as a common aspect of leadership experience (Brooking, 2007; Cranston, 2007; Douglas, 2007; Harold, 1999; Hodgen & Wylie, 2005; Whitaker, 2003; Wylie, 2008), and the current study serves to confirm that this is still the case. What is interesting in the light of Hodgen and Wylie's (2005) earlier

finding that the lack of time to focus on teaching and learning was the single most high impact stressor for school leaders, is the indication that participants in this study have experienced a re-balancing of their stress levels through the voluntary shift out of leadership position towards a greater involvement in teaching and learning. This perhaps both underscores the value placed on teaching and learning by educational leaders, and raises the question of whether there might be ways of achieving a balance which recognise this value other than through the relinquishing of position. In this regard it would appear simplistic to suggest that a balance might be achieved by the inclusion of a greater teaching component to leaders' roles, and indeed, this may well exacerbate the sense of imbalance and stress experienced. Evidence for this likelihood can be found in Hodgen and Wylie's (2005) finding that teaching principals were more likely to report multi tasking and the lack of time to focus on teaching and learning as sources of stress. Alternatively, if it is the breadth of the leader role that is at issue, the possibility of the identification and delegation of components of the teacher-leader's role deemed able to be carried out by other, perhaps non-teacher qualified staff, may be a consideration. However, it is worthy of note that such a 'parcelling-up' and delegation of role tasks, as is being implemented in England under the name of Workforce Reform, has been regarded in some quarters as a drive towards cost cutting, managerial efficiency, and ultimately de-professionalisation, and consequently has met with critical response (Gunter, 2008).

Work-work balance

In further exploring the theme of the seeking of balance, it begins to become apparent that the re-balancing experienced by participants in this study is not simply about the number of hours worked and having more time for personal life priorities. This lends support to both Hodgen and Wylie's earlier analysis (2005), and the subsequent progress update (Wylie, 2008), which found that it was not hours worked per se which were the major issue in leader wellbeing but rather the balance of required role tasks. Indeed, beyond what has already been discussed here as a work-life balance, this study found that the seeking of balance was also experienced as being around what may perhaps be described as a work-work balance. This seeking of a work-work balance was highlighted in the present study as a shift in one's way of being, having stepped aside from position, and was found to particularly involve a re-balancing of the intensity of the workload, and tensions within the nature of the role itself.

The intensity of leader's work was identified in this study in a sense of always being "on the hop" (Interview seven). This finding lends support to those of a number of other studies, in several countries, commenting on the increasing intensity of workload for educational leaders (Cranston, 2007; Gronn, 2003; Hodgen & Wylie, 2005). Gronn (2003), in his reporting on a study of Ontario principals and vice-principals, notes the claim that there is "simply too much to do in the time available" (p. 68). This intensification of workload is further echoed in Cranston's (2007) finding that New Zealand deputy and assistant principals' experience having "too many portfolios to manage effectively" (p. 23), and Hodgen and Wylie's (2005) analysis that 80 per cent of New Zealand principals see no prospect of 'getting on top of' the volume of work being asked of them. In this light, what is of further concern is the indication by participants in this study that associated with the intensity of work there can be a particularly damaging feeling of never getting things finished. This finding appears to be consistent with those elsewhere of the interrupted and unpredictable nature of leaders' daily work, within which there is an emphasis on being responsive to demands which must be dealt with immediately (Cranston, 2007). While in Cranston's (2007) study "the 'now' aspect of the role" (Cranston, 2007, p. 23) has been identified as a factor mitigating against middle leaders moving towards work roles they regard as more ideal, it is suggested here that this aspect of the intensity of the work of leaders and the sense of never being finished may also provide impetus for the stepping out of leadership as a seeking of work-work balance.

The seeking of a work-work balance also appears to extend to a re-balancing of tensions in the nature of the role itself. Participants in this study were found to experience a seeming futility or 'hollowness' of elements of the leadership role while in position, and a degree of managerial tension. This is evident in the number of participants who referred to dissatisfaction with "administrivia" (Interview six) or "petty administrational tasks which seem to intrude" (Interview two) while in position. The lack of work-work balance is further expressed even more bluntly by one participant who described his role as "just shitty work that no-one else would do, but which had to be done given the context of the times" (Interview six). The context referred to here is that of the neoliberal reform of education and corresponding emphasis on the managerial roles of leaders, the impact of which will be returned to shortly.

That the leaders in this study experienced a sense of the seeming futility or pettiness of aspects of their roles is consistent with Cranston's (2007) recent comparison of the 'real' and 'ideal' roles of middle leaders. His findings indicating real roles comprising an over representation of management and lower level administrational tasks, and the lack of an ideal involvement in strategic and educational leadership, are supported here. It seems apparent, then, both in this study and those elsewhere, that there can be mismatch between the way leaders perceive the nature of their role or would prefer it to be, and the actual experience of how it is lived. Moreover, it is in this respect that the current study finds the stepping out of leadership yet remaining in the workplace to be experienced as a seeking of a work-work balance. The concerns embodied in this aspect of the experience of participants in the present study appear to support and extend Wylie's (2008) finding that the four most desired changes to principals' work were more time to reflect, a reduction in administration and paper work, more time for educational leadership, and a more balanced life.

A further aspect to the seeking of a work-work balance is that of the impact of educational reform and managerialism on those in leadership roles. That this impact is found here to be described as predominantly negative and unwelcome is consistent with a significantly large body of critical research in this area (Ball, 2007; Billot, 2003; Cranston, 2007; Gewirtz & Ball, 2000; Harold, 1999; Hodgen & Wylie, 2005; McInerney, 2003; Thrupp & Willmott, 2003; Whitaker, 2003; Wylie, 2008). Several participants in this study overtly commented on a discomfort with the new "corporate kind of school style" (Interview six) and of organisations with a "vision in terms of numbers" (Interview one) rather than education, in keeping with the findings of widespread earlier studies. However, while much of the experience described in this study bears the stamp and discourse of a managerial influence it is interesting that not all participants overtly framed it in this way. A possible explanation for this is that, as has already been noted, the majority of current leadership literature in this area is principal-centric in nature and no principals were represented in the sample interviewed for this research. Of further interest is that of those who did overtly indicate experiencing a managerial tension several were in private training establishments, a sector arguably the most influenced by neoliberal marketisation, and yet under-represented in research literature. This raises the possibility that perhaps the impact of managerialism is an overtly identified and articulated feature of the experience of those

holding the 'top' jobs in a reformed public education system, and an inherent component of roles in private sector providers, while for those in middle leadership there is a living of the downstream effects as reflected in the intensification of workload, a tension in the nature of work carried out, and the experiencing of a sense of imbalance. This bears further investigation with a larger targeted sample.

While the findings of the current study confirm the identification in previous research of role and work-life balance as an issue, it is worthy of note that the findings of this study go beyond simply indicating the aspects of the work-life or work-work experience which may be perceived as undesirable or imbalanced. This study offers an insight into 'the next step', that is to say the act of re-balancing, and provides evidence that the stepping aside from leadership position can be experienced as a tangible outworking of the human need to maintain, or retrieve, a sense of balance. In this regard, the current findings add an evidential base to Hodgen and Wylie's (2005) conclusion that school leaders wellbeing "can most be improved by improving workload and role balance" (p. 63).

As a final consideration of the re-balancing process it is interesting to compare the seeking of balance through stepping out of leadership found here, with Schor's (1998) notion of 'downshifting'. In the conception she describes, downshifting is a predominantly voluntary lifestyle change involving earning less money. The most common reason given for such a change is reported to be "wanting more time, less stress, and more balance in life" (p. 114) with additional motivations being "the need to do something more meaningful in their lives and to spend more time with their children" (p. 114). While this author has some reservations about the implications of the downward movement suggested in the terminology itself, there does seem to be a degree of similarity in the articulated aspirations of Schor's (1998) downshifters and the leaders in this study. It is furthermore worthwhile to note that the trend towards downshifting that Schor (1998) identifies is claimed to differ from earlier moves towards simpler living in that it does not involve 'dropping out' of society, a tendency for communal living, or a particular ideological motivation. Certainly the participants in this study, in their continuing to work within the same educational institution were not dropping out.

Where there is a divergence, however, with Schor's (1998) notion is that her theorising places an emphasis on "a dissatisfaction with the work-and-spend culture" (p. 113), the increased awareness and rejection of the values of consumerism, and therefore the seeking of balance through earning and spending less. The essential theme of balance, as uncovered in this study, rather appears to suggest the experience of a deeper and ongoing human need that extends beyond a rationalised ideological position.

The Experience of a Re-Turn to Teaching

The fourth theme revealed in this study was that of a powerful sense of a re-turning to teaching. As noted in chapter five, this experience may be regarded as having links to the previous theme of a seeking of balance but was articulated as a separate theme on account of both the strength and universality of its embodiment in participant stories. All the participants in this study described a resoundingly positive sense of a shift in focus back towards "the simple pleasure of teaching" (Interview six), and offered an expression of passion reclaimed. Exploration of this finding both adds weight to and extends aspects of the findings of earlier studies in the domain of role exit, and also opens possibilities for the discussion of teaching as a mission or calling.

In exploring the theme of the re-turn to teaching, it is of little surprise that this experience was found to be so positive in the light of earlier findings regarding the educative priorities of leaders (Billot, 2003; Cranston, 2007; Hodgen & Wylie, 2005). The sense of pleasure and simplicity found here in being able to re-direct a great degree of time and energy to teaching offers a parallel to the findings of Hodgen and Wylie (2005), who highlight a lack of time to focus on teaching and learning as one of the three top stressors for educational leaders. The findings of the current study in this regard also provide an interesting corollary with those of Cranston's (2007) which indicated a significant percentage of potential leadership candidates did not seek such positions due to a "preference to remain closer to the teaching context" (p. 20). This suggestion of an unwillingness to turn away from teaching roles in order to seek 'promotion' perhaps sketches a mirror image to the experience of joy found here in turning back to teaching having occupied a leadership position.

The strength and universality of this sense of re-turning to teaching also has a resonance with the findings of the universality of an emphasis on 'helping children', and being able to have an impact on students, described in earlier studies of voluntary role exit in

education (Harris & Prentice, 2004; Johnson, 2003). It is interesting that Johnson (2003), in her study of principals exiting to other positions, reported on a widespread theme of being of service and found that both satisfied and unsatisfied exiters felt it was important in their new roles that they were "still helping children, perhaps even to a greater extent than they had done in the principalship" (p. 251). Elsewhere, Harris and Prentice (2004) further reinforce the centrality of being able to have an impact on students in the experience of role changes, but from the flipside point of view of what is perceived to be lost in retiring from position. Their investigation of retiring community college faculty found that the retirees, in evaluating what they gained and lost on exiting their positions, predominantly described a sense of "the loss of the excitement of the classroom and daily interactions with students" (Harris & Prentice, 2004, p. 739). The findings of the current study add further weight to this evidence of the place, in positional shifts, of a widespread and powerful valuing of the interactions with, and sense of being of service to, students. What is worthy of note, however, is that these earlier studies, while addressing voluntary role exit, do not specifically capture the experience of stepping aside yet remaining as a teacher in the same workplace. Indeed, as has been highlighted throughout this study, there is a paucity of published research in this area, and in this respect the current finding of the strength of the sense of re-turn to teaching extends those of existing investigations.

While, as is apparent above, the experience of the re-turn to teaching found in the present study draws together and lends support to elements of the findings of earlier research, there is also the suggestion of an important distinction. In the existing studies which consider the experience of a voluntary stepping aside from leadership positions in education, the valuing of working with students is largely viewed through the lens of role exit theory (Ebaugh, 1988; Freese, 2003; Harris & Prentice, 2004; Johnson, 2003). In this light, an ongoing interest in teaching and the involvement with students often appears to be presented as a functionary accompaniment to "the need to maintain a consistent sense of self … through the transition processes" (Johnson, 2003, p. 251). There is perhaps an implication in these role exit studies that a focus on teaching can be a useful asset in the creation of the construct of Ebaugh's (1988) ex-role, rather than a deeper human experience of intrinsic interest in its own right. The current study, in taking a hermeneutic approach, serves to emphasise the primacy of experience and the findings here instead highlight a strong sense of what might be described as

‘homecoming’ in the turning back to, and reclaiming of, an original passion. The strength of this sense of homecoming opens the way for a consideration of teaching as a calling, and this prospect is worthy of further discussion.

The call of teaching

The sentiment that teaching was “the most wonderful thing to be *back* in” (Interview three) was echoed in a number of ways by all the participants in this study. Moreover, and significantly, many overtly spoke of passion, and even love, in their work with students. There are striking indications here, made evident in this use of language and its underlying ‘heart’, that the re-turning being described is to something more significant than just a job role. The findings of the current study in this respect offer some similarity to those of Johnson (2003) and Harris & Prentice (2004) who alluded to a sense of ‘mission’ in the experience of educators making role shifts, and a “relish[ing of] the belief that they were making a difference in people’s lives” (Harris & Prentice, 2004, p. 739). If, as Day (2004) suggests, “the origins of passion lie in the ‘call’ to serve, [and] in the belief that we can make a difference in the quality of students lives” (p. 17), then the present findings appear to suggest it possible to consider the experience of stepping out of leadership yet remaining in the workplace as a re-turn to the call to teach. Furthermore, the findings of this study lend support to the claims of Nieto, Gordon and Yearwood (2002) that teaching “is, in a word, a vocation based on love” (p. 350).

Hansen (1995), in his exploration of the call to teach, describes the concept of vocation as “work that has social value and that provides enduring personal meaning” (p. 9). Understood in this manner, he contends, “the desire to teach constitutes something more than casually selecting a job off the employment shelf” (p. 125). The strength of the current findings of a re-turn to teaching, and associated sense of homecoming described by participants, add weight to these assertions of the essentially vocational, rather than occupational, nature of teaching. Moreover, this in turn raises the question as to what extent the decision to step out of the title of leader may be a stepping away from former position, and to what extent a stepping towards teaching. The experience of the participants offered here was found to variously embody both the aspects of an active stepping away from “being in such an awful position before” (Interview one) and a stepping toward the calling of “who I am really am at heart … a teacher” (Interview

three). In those stories where there was a strong indication of stepping away, there appears to be a consistency with Day's (2004) contention that the education reform agenda in its "broader bureaucratic, managerialist implementation has exhausted many teachers so that they have lost the passion to educate with which they first entered the profession" (Day, 2004, p. 14). If this claim is true for teachers in classrooms, how true might it also be for 'teachers at heart' who have accepted leadership positions and find themselves as implementers of these very reforms? In this light, the question as to whether it is possible that the stepping out of leadership might be viewed as a way of reclaiming an original passion seems relevant.

Finally, an additional point worthy of note is that, while for all participants, there was a clear acknowledgement that teaching was their passion, the initial stepping into a leadership position was described by some as being seemingly rather less passionate. One person, for instance, indicated that he "just thought 'Oh, you go on and do these things'" (Interview six). It is interesting in this respect to consider Collay's (2006) assertion that "most of us do not question the idea that teaching is a calling, yet we may not characterize positional leadership the same way" (p. 132). While this is an area that would benefit from a much greater degree of research, the current findings strongly suggest teaching to be experienced as a calling, and perhaps offer tentative support for the notion that the same cannot be said for holding positions of leadership.

The strength and resoundingly positive sense of a shift of focus back towards the simple pleasure of teaching is a key finding of this study. This re-turn to teaching seems to indicate a reclaiming of an original passion and calling, or perhaps the rather more philosophic proposition that "the practice [of teaching] and its tradition choose teachers to join it, rather than the other way around" (Hansen, 2001, p. 156). Further study to investigate whether the experience of an involuntary shift back to teaching, through the impact of restructuring or downsizing for instance, involves such a positive sense of re-turning, would be of much interest and value.

The Experience of Letting Go and Holding On

The final essential theme to be discussed is that of letting go and holding on in the experience of stepping out of leadership yet staying in the same workplace. This seemingly paradoxical aspect appears central to leaders' experience of relinquishing yet remaining, and stories pointed to aspects of tension, an impact on one's sense of

identity, and ultimately an experience of ease and dis-ease in stepping into a space charted only by anticipation. The discussion in this section addresses each of these aspects before further providing a consideration of the strength of emotional response and a review of the notion of 'leaving the ship but staying on board'. Given the apparent lack of previous direct study of the phenomenon explored in this investigation, the experience of letting go and holding on while remaining in the same workplace is not specifically represented in research literature. The findings of the current study in this regard offer exploratory provisional understandings and suggest avenues for further research.

Tension

That the experience of stepping out of leadership yet remaining in the workplace is found to involve a degree of tension in the processes of letting go and holding on is perhaps not altogether surprising. This sense of struggle described by several participants in this study as taking place around what is let go of, and what is held on to, is consistent with anecdotal evidence and appears to lend support to claims of tension found in the field of role exit. Ebaugh (1988), for example, in outlining her stage model of the role exit process describes the final stage as one of 'creating the ex-role'. Her associated contention that "in a very real sense, the process of becoming an ex involves tension between one's past, present and future" (Ebaugh, 1988, p. 149) has a resonance with the processes of letting go and holding on, and finds support here.

What is of further particular interest, is the finding in the current study that this tension in letting go and holding on can be experienced as originating both from within the leader themselves, and through the expectations of others, from without. The experience of inner tension, best exemplified in the acknowledgement of one participant that "once you've been in that position of leading, it's hard not to lead" (Interview three), is consistent with comments by Gronn (2003) regarding succession processes that "letting go, then, is difficult to come to terms with because of the intensity of the leader's commitment to, or identification with, what she or he has achieved" (p. 136). The degree of strength of this identification by the leader with their professional role and achievements is a point that will be returned to shortly, in the meantime however, it is noted that personal attachment, and a corresponding potential for internally generated tension in relinquishment, is confirmed in the present study. Furthermore, this internal

tension can be evident in an emotional outworking, consistent with Ebaugh's (1988) finding that "a person in the process of establishing him- or herself in a new role struggles to become emotionally disentangled from the self-perceptions and normative expectations of a previous role" (p. 149). Several participants in the current study also reported the experience of a tension in letting go and holding on as originating in the ongoing expectations of others following positional relinquishment. This is reflective of Ebaugh's (1988) description of the place of one's former role obligations in shaping the present, and adds weight to her assertion that "the essential dilemma involved in the ex-role is the incongruity and tension that exists between self definition and social expectations" (p. 150).

While the findings of the current study with regard to the tension of letting go and holding on, offer support for those of role exit and succession studies elsewhere, it is noted that these other studies do not specifically address the phenomenon of relinquishing position yet remaining in the workplace. Consequently, at least two worthwhile questions may be posed for further consideration. Firstly, where the sense of tension of letting go and holding on originates from within, how might this be experienced differently if the former leader remains in an environment where the evidence of what one is endeavouring to let go of, or hold on to, is present on a daily basis? Might this heighten or diminish the sense of inner tension? Secondly, where tension is experienced as arising from the expectation of others, how might this experience be impacted by continuing to work in exactly the same workplace with exactly the same people? In this situation might the level and nature of the expectations placed on a former leader be experienced as more, or less, comfortable? While conclusive answers to these questions are not possible given a sample size of eight, what is clear is that the participants in this study have been found to experience a tension in letting go and holding on, and some particularly powerfully. What is also clear is that in relinquishing position but remaining, the participants of this study do not have the possibility of avoiding this tension through the 'luxury' of a move to a new work environment. In this light, further investigation into the particular tensions of remaining in the workplace would be of benefit.

Impact on identity

In returning to the significance of the strength of the identification by leaders with their professional roles (Gronn, 2003), it is worthy of note that the findings of this study suggested the impact on sense of identity to be an aspect of the experience of letting go and holding on. In stepping out of leadership, participants variously described experiences of loss and going through "a terrible identity crisis" (Interview three), of identity maintained, and even of identity seemingly 'reclaimed' by "moving back into control mode, reclaiming my own life and blaming nobody" (Interview four). While these findings are consistent with contentions elsewhere that one's sense of identity can be closely linked to role change (Ebaugh, 1988; Freese, 2003; Johnson, 2003), the range of experiences highlighted here gives cause for consideration. Both Ebaugh's (1988) and Johnson's (2003) findings in the domain of role exit suggest that those leaving a role seek to create a continuity of sense of identity and self through the formation of the new 'ex-role'. In order for this to occur, according to Ebaugh (1988), "one's previous role identification has to be taken into account and incorporated into a future identity" (p. 149). However, as indicated in the range of experience noted above, the findings of the current study appear to indicate that this is not always experienced as being comfortably achieved while remaining in the same workplace.

Of particular interest is the experience of the participant in this study who described the most intense questioning of identity and associated sense of loss. Although this experience is acknowledged as not being representative of the entire group of participants, the hermeneutic approach taken in this study allows for its identification, and indeed the strength of the experience demands further discussion. It is perhaps significant to consider that the experience of the greatest sense of re-adjustment of identity was offered by the participant in this study holding the most senior position, prior to relinquishment. While it is recognised that no substantive claims can be made on the basis of the experience of one, it does serve perhaps to raise for further exploration the question as to whether the level of position can play a part in the experience of the impact on identity having stepped aside. More specifically, it opens the way for a consideration of whether it is possible that those with 'higher' positions may experience a sense of identity more highly defined by their leadership position, and therefore, a greater sense of loss in relinquishing position. If this is indeed the case, the finding here would appear to be consistent with those of earlier studies suggesting that

people in professional and leadership roles experience a greater 'hangover' identity from their former role, and subsequently, a potentially greater difficulty in disengaging from them (Ebaugh, 1988; Wacquant, 1990).

In addition, given that all the participants of this study were necessarily in professional and leadership roles, it is of value to reflect on Ebaugh's (1988) further claim that "it is safe to say the more personal involvement and commitment an individual had in a former role, that is, the more self-identity was equated with role definition, the more role residual tended to manifest itself after the exit" (p. 178). While clearly it is possible to have a high degree of personal commitment to a leadership role of any level, and certainly there is no intent here to suggest that those who experience 'easier' passages out of leadership might have been less committed, it does seem feasible that the demands of higher tier leadership positions may be such that they more easily become associated with a sense of identity to a relatively greater extent. The findings of the current study indicating that the 'highest' level leader found herself asking the question "Who am I?" (Interview three) having stepped out of position, whereas this experience was not described by other participants, may offer tentative support for a link between level of position, identity and the ease of the experience of relinquishment. Certainly the present findings highlight this as an area requiring of further investigation.

Finally, perhaps these findings may also be considered in the light of those of Ackerman and Maslin-Ostrowski (2004) that "leadership selves are unmade and remade through crises" (p. 324). In this respect is it possible for the participant who described the greatest impact on identity that although there was an unmaking of leadership self through the relinquishment process, the remaking was unable to be carried out while in the same workplace? The participant's final summation of her experience in the comment "the price you pay for picking up the role in the first place is that you have to leave if you step out of it, you can't go back and work within the institution!" (Interview three) would tentatively seem to suggest that this could be a possibility. Further comparison of the experiences of top tier and middle leaders in relation to the impact on identity of the relinquishment process would be informative in this regard.

Ease and dis-ease

In addition to the identification of a fundamental tension that can exist in letting go and holding on, and the potential links with one's sense of identity, this study found that the

stepping out of position yet remaining in the workplace appeared ultimately to be lived as an experience of ease and dis-ease. The stories captured in this study are not uniformly 'positive' or 'negative' thus providing a confirmation of the richness and complexity of the human experience. This offers interesting possibilities for consideration in relation to the seeming diversity in the nature of the positional relinquishments, and the place of anticipation in the ease or dis-ease of the experience.

Firstly, worthy of attention is the diversity of the 'types' of positional relinquishment situation within which there is an experience of an ease of letting go and holding on. The use of the term 'types' is not intended to imply a rigid or generic categorising of relinquishment, or even to suggest that such a classification is possible, but rather it serves as an umbrella for the varying language which the participants themselves have used to describe the nature of their shift. What is of particular interest is that participants in this study who experienced an ease of letting go and holding on described this as occurring in at least three seemingly distinctive types of relinquishment situation. These situations have been identified in chapter five as a complete shift from the role of leader to 'just a teacher', a 'tainted' shift involving the relinquishment of title but retaining of formal leadership role, and the sense of having made a 'swap' with one's successor. Given the diversity of these situations it is of value to contemplate what it is they may offer in the understanding of the experience of ease of stepping out leadership position. While each of each of these differing types of positional relinquishment of necessity includes a stepping out of the title of leader, they appear to involve differing degrees of formalised leadership role relinquishment. Indeed in the case of the complete shift from leader to teacher there is no ongoing formalised leadership role, a situation the participant describes "as a great deal" (Interview one), while in the 'tainted' shift the participant continues to be a part of the management team and play a significant role in decision-making. That each of these types of relinquishment is experienced positively, tentatively suggests that the ease of stepping out of leadership position may not be related in a straightforward fashion to the maintenance or otherwise of a formalised ongoing leadership role. In this regard it also worthy of note that for other participants the presence of an ongoing leadership role, created by the expectations of others in the workplace, was regarded as unwelcome and an aspect of the dis-ease of letting go and holding on.

In further considering the diversity of the situations experienced in this study as an ease of letting go and holding on it begins to become apparent that there is a great deal of variety in the amount of time and planning involved in the decision to step aside. In the situations above, for instance, the decision to make the complete shift was unplanned and instant, the tainted shift considered for two weeks, while the swap was something that had been 'in the back of the mind' for two years and then was announced some eight months before it was actually due to take place. Despite this seeming variation in degree of premeditation, there was an ease of letting go and holding on experienced in all these situations. Conversely, in what is perhaps the strongest experience of dis-ease described in this study, the participant indicated being aware that the leadership position was initially accepted knowing that it was for a fixed term 2 year period, and would be re-advertised at that time. While perhaps logical to imagine that the ease of the act of relinquishing a leadership position might be greater the longer one has to 'get used to it', the findings of the current study suggest this not be the case.

A second aspect for consideration with regard to letting go and holding on is the indication of the potential importance of the place of anticipation in the ease and dis-ease of the experience. As discussed above, the 'success' or otherwise of the stepping aside experience does not appear to rest unambiguously on a single 'type' of relinquishment, or the degree of premeditation involved, however what is highlighted in this study is that all of the experiences of an ease of letting go and holding on were associated with a sense of the anticipated coming to pass, and conversely, that experiences of dis-ease appeared linked with a lack of alignment between the anticipated, and actual lived reality. In this regard, the findings of the current study offer the threefold suggestion that the experience of stepping out of leadership cannot be fully known before it is lived but that it can be, and is, anticipated; that there may be disjuncture between the anticipated and the actual; and that the extent of this disjuncture appears to have an impact on the ease and dis-ease of the experience.

This suggestion of a degree of uncertainty and the place of anticipation found here presents some similarities with Ebaugh's (1988) earlier notion of an experience of 'the vacuum' in role exit but also, perhaps significantly, begins to indicate some differences. In her study of a variety of role exits, Ebaugh (1988) documented a widespread sense of being "caught in a vacuum between the past which no longer exists and the unknown future" (p. 144). In this vacuum, she suggests, those stepping out of roles feel 'neither

here nor there' and the future becomes "frightening in its uncertainty and unfamiliarity"(p. 144). The findings of the present study with regard to letting go and holding on do offer support for this earlier reported sense of stepping into the unknown, and furthermore go on to suggest that in being in a place of transition between the past and the as yet uncertain future, anticipation may play a role. Indeed the notion of voluntary relinquishment of position of necessity suggests an anticipation, as in choosing to let go of something there is the implication of an expectation as to what it is one is letting go of and, consequently, holding on to.

However, where the findings of this study diverge with those of Ebaugh (1988) is that the stepping into the uncertainty of the future appears to involve neither the degree of fear or nostalgia suggested in her study. One likely explanation for this is that the participants of this study were all making an exit from a professional position and voluntarily choosing to remain in the same workplace, whereas Ebaugh's (1988) were not. In remaining in the workplace there is perhaps a suggestion of being comfortable with their current environment and hence a lesser likelihood of fear. Certainly, by remaining in the same environment it seems reasonable to imagine that there would at least be a greater degree of familiarity. It is also possible that in remaining in exactly the same workplace, with exactly the same people, there is the implication of a high level of prior understandings with regard to both people and environment. Consequently it seems probable there are likely to be higher levels of anticipation around how the relinquishment experience will play out and indeed, that these anticipations held regarding the future may take on a greater sense of certainty. Thus the leader stepping aside yet remaining in the same workplace may have a greater pre-relinquishment sense of confidence in the post-relinquishment scenario but, as a corollary of this, may suffer greater disappointment if the anticipated does not come to pass.

If the role played by anticipation in the ease and dis-ease of letting go and holding on is confirmed to be as significant as this study seems to suggest, there is the emergence of several quite pragmatic issues for further attention. Specifically, in organisations where leaders are stepping aside yet remaining, questions might be asked as to how the anticipations of the departing leader around what is to be held on to and let go of are communicated, and to whom. Attention might also be directed into a consideration of the processes in place for when the relinquishment anticipations of varying parties differ and for the monitoring of the ongoing coming to pass or otherwise of the anticipated.

Finally, it must be highlighted here that in exploring the experience of the ease and dis-ease of relinquishing position yet remaining in the workplace, the potential place of the personal disposition of the leader should not be overlooked. While beyond the scope of this study, and therefore not included in the discussion above, it does seem possible that disposition may well be implicated in the relinquishment experience, and this certainly is an area worthy of further investigation.

Intensity of emotional response

While it may be of little surprise that changes in position involve the evoking of a degree of feeling, what was somewhat unexpected, and in some cases a highly significant aspect of the experience of relinquishing position yet remaining in the workplace, was the intensity of this associated emotional response. This strength and depth of response was revealed not only in stories describing a sense of being utterly marginalised, 'miffed' or 'gutted' for example, but also in the evidence, as highlighted in Chapter One of this thesis, that the experience remains powerful long after the event for some participants. While this intensity of response might perhaps be expected in a situation involving the public stigma of involuntary relinquishment (Gronn, 2003), what makes the current finding somewhat surprising, and of particular interest, is that the nature of the relinquishment explored in this study was voluntary.

One possible explanation for this unexpected finding is that, voluntary and involuntary relinquishment aside, leadership is an emotional occupation. Certainly, Beatty and Brew (2004) in their researching of emotional epistemologies contend that "there are inextricable links among emotion, learning and leading" (p. 330) while Ackerman and Maslin-Ostrowski (2004), moreover, point to evidence suggesting "at a common sense and experiential level, that emotion matters a great deal in the exercise of leadership, especially during times of crisis" (p. 311). The depth of emotion found to be experienced by leaders in this study would seem to be consistent with such contentions, and the notion of the particular import of emotion in times of crisis offers interesting possibilities for consideration.

While it is not immediately obvious that a voluntary relinquishment of position might be described as a time of 'crisis', it nonetheless represents a significant and public leadership transition. Gronn (2003), in discussing the emotions of leaders, suggests that collective anxiety in a workplace is heightened during times of organisational transition,

and moreover, that these transitions "are anxiety-inducing because they threaten existing identities, loyalties and commitments" (Gronn, 2003, p. 133). If a change of leader may be seen as such an organisational transition, regardless of whether it is voluntarily or involuntarily triggered, then it follows that emotions around identities, loyalties and commitments may be generated. Gronn's (2003) approach here, of course, is from the collective perspective of staff in transitioning organisations, but it seems reasonable to assume that if this process is emotional for staff, it will also be so for leaders. This line of thinking may assist in explaining the intensity of emotion surrounding even voluntary exits from position, as found in this study.

Elsewhere, Hargreaves and Fink (2006) confirm leadership succession to be "acutely emotional in nature" (p. 85). As such, they argue that "a test of the health of all organizations is their capacity to manage endings – to allow leaders to complete their work, to recognize their achievements, celebrate their promotion or retirement, and leave them feeling that their legacy is in capable hands" (Hargreaves & Fink, 2006, p. 85). What is worthy of note here, however, is that their conception of succession appears to rest on an assumption of the predecessor leaving the workplace for retirement, or promotion. There seems to be no accommodation for the experience of succession to include a stepping aside, rather than up, or indeed, a remaining in the workplace by the former incumbent. The very fact that there are participants for the current study appears to indicate a need for a re-evaluation, and perhaps a broadening, of this assumption.

If, as Hargreaves and Fink (2006) suggest, "there is a dark corner in the soul of many leaders that secretly wants their own brilliance never to be surpassed, that hopes their successor will be a little less excellent, [and] a little less loved than themselves" (p. 87), how much more complex might the emotional landscape be when, for the former leader, the succession process involves neither what might be recognised as promotion or retirement, and moreover includes a remaining in the same workplace? Comparative studies of the depth and range of emotions experienced by leaders who leave the workplace, and those who remain, may be informative in this respect.

If the emotional dimension is then a seemingly integral part of leadership, and in particular of leadership transition, it is worthwhile considering why the participants in this study did not all appear to describe a similar strength of response. It is possible, of

course, that they simply did not experience the same emotions to the same extent, however, could it be, as Ackerman and Maslin-Ostrowski (2004) find, that there is "no simple language in the workplace to speak of the feelings of leadership isolation, fear, vulnerability and loss" (p. 312)? Moreover, as Beatty and Brew (2004) claim, even were this language available, "leaders have routinely found that their emotional selves are anything but welcome at work" (p. 331). Perhaps, in the stepping out of the position of leader, as in the practice of other areas of leadership, emotional silence is often equated with professionalism (Beatty & Brew, 2004) or perhaps, as Gronn (2003) suggests, "the characteristic emotional response of individuals to the likelihood of change is one of ambivalence, as they try to cling to the positives and discard the negatives" (p. 133).

While there is certainly room here for further study, the findings of the current study serve to suggest that the place, and depth, of emotion experienced in overtly voluntary movements out of leadership position, should not be underestimated. This raises questions as to how we may become more fully aware of these emotions in our workplaces, and indeed, how we may identify and address the attendant needs of leaders who choose to step out of position but not leave the organisation.

Leaving the ship?

A final area for discussion in the experience of letting go and holding on is the reconsideration of the notion of 'leaving the ship but staying on board.' What is worthy of attention here is the possible distinction between leaving the 'ship' of leadership position, and the ceasing of being a leader altogether. That is to say, while the participants of this study have certainly exercised leadership through the shouldering of responsibilities attendant to their titles, and have subsequently relinquished these titles with varying degrees of ease and dis-ease, does this also suggest that they have exited from 'being' a leader? The richness of the human experience of 'leaving the ship' captured in this study prompts a need for further reflection in this regard. In particular the current study invites reflection as to whether the phenomenon of leadership may be considered to be a function of position or person, and if it is the latter, what implications this may have for the relinquishment process and experience.

Emerging research is increasingly offering a perspective of leadership that goes beyond an emphasis solely on the application of skills and knowledge, and a technical rational approach to implementation of tasks (Ackerman & Maslin-Ostrowski, 2004; Beattie,

2002; Palmer 2008). These studies begin to argue that "an essential job requirement for the twenty-first century school leader is to be a whole person in his or her leadership" (Ackerman & Maslin-Ostrowski, 2004, p. 325) and that this personhood of leadership involves "ethical, emotional, social and spiritual dimensions" (Beattie, 2002, p. 205). Moreover, interest in the authenticity of leading and teaching further reinforces the importance of the whole person, and place of 'self', in being authentic in these activities (Duignan & Bhindi, 1997; Gibbs, 2006).

The previously articulated understandings emerging from the experience in the current study around the place of emotion and sense of self in relinquishment would appear to lend support to these suggestions of leadership as a whole person. If then, the phenomenon of leadership may be accepted as being about a person (or persons) as opposed to a job description, perhaps the very notion of 'exit' needs to be re-conceptualised. More specifically, this re-conceptualisation might take place around the consideration that, while it may be possible to relinquish a leadership position do we, or even can we, exit from the 'being' of leader? In this regard role exit theory, with its confining emphasis on the construct of role and the processes of disengagement from the old and socialisation into the new, may not be well positioned to adequately encompass shifts involving the personhood or being of leadership. A reconsideration of the notion of exit which seeks to take into account the being of leader raises further prospective questions as to how important it might be for this 'being' to continue to find expression after a positional shift, and in particular relation to the current study, how this might occur within the same workplace.

The findings of the present study would appear to indicate that in 'leaving the ship but staying on board' participants did not stop being leaders. All described experiences reflected an ongoing expression of the person of leader, despite having stepped out of the position of leadership, although the nature of this expression varied. For some this ongoing being of leader found expression in a recognised place of continued influence in the organisation. This was evident in the experience of those participants maintaining an input into management decision-making processes, those who found themselves co-opted on to the Board of Trustees in specific situations, or perhaps acting as the institutional memory of the organisation. In other participant stories the ongoing being of leader was shown through involvement in supporting new incumbents in leadership positions, including their own successor. This 'being there' for, and with, the new

incumbent, and the engagement in providing what was described in one story as "mutual support for each other through those role changes" (Interview one), serves to indicate that the former position-holder has certainly not exited from the person of leader. A further expression of the ongoing personhood of being a leader is also evident for several participants in their overt valuing of the autonomy of being back in the classroom. This experience of autonomy suggests an ability to make decisions and influence one's surroundings, and indeed in this light, these participants seem to be describing the continuation of being a leader as a teacher within their own classroom. That teaching can be experienced as leadership is perhaps of little to surprise to those of us who teach, and moreover supports the contentions of Gunter (2005), among others, that "educational leadership has always been a part of being a teacher and doing teacherly things" (p. 7).

The findings here and elsewhere suggesting that leadership may be about more than simply a position, and indeed that the being of leader may not be exited from but rather continue to find expression on relinquishing position, offer a rich vein for further investigation. While this continuance of the being of leader is perhaps inherently acknowledged, and indeed expected, in the societally accepted norms of leaving one leadership position to seek promotion to ever 'higher' ones, it poses interesting questions in relation to the central concern of this study, namely the voluntary stepping aside from position yet remaining within the same workplace. Such questions might be framed around the place of the notion of a de-stigmatised fluidity of stepping in and out of leadership position which still provides recognition of the being of leader. In this regard, the possibilities for the ongoing expression of the person of leader through, for instance, recognised advisory, nurturing and mentoring roles, would be worthy of further research.

In exploring the theme of the experience of letting go and holding on, then, a significant amount of reflective discussion has been offered around the aspects of the tension, impact on sense of identity, experience of ease and dis-ease, strength of emotional response and the possibilities of 'leaving the ship but staying on board'. This degree of discussion is indicative both of the particularity, and unstudied nature, of the experience of relinquishing yet remaining and consequently, a number of questions potentially leading to further study have been raised.

Summary

In this chapter aspects of the key thematic groupings arising from participant stories have been discussed. These themes of a-lone-ness, ready-suddenness, balance, the return to teaching, and letting go and holding on have been explored in depth both with, and beyond, existing literature. Indications have been provided of where these findings support those of earlier studies in the literature, and where they diverge or signpost avenues for future research. In the subsequent, and final, chapter of this thesis a summative overview of the study will be provided along with an appraisal of its significance and contribution. An evaluation of the limitations of this research will be offered and avenues for further investigation highlighted.

Chapter Seven: Conclusion

This chapter provides a brief review of the study and presents a summary of the key findings. The significance of this study in giving voice to previously undocumented leadership experience is assessed, with the contribution to the literature base, implications for practice, and the impact on researcher understandings being indicated. Potential limitations of the study are evaluated and recommendations for further research advanced. The chapter closes with concluding remarks which return to the centrality of leaving the ship but staying on board, and highlight the richness and depth of this overlooked human experience.

Summary of Key Findings

This study has sought to capture the experience of the voluntary relinquishing of a position of leadership yet remaining within the same educational workplace. In order to address the unstudied nature of this phenomenon within our educational institutions, the thrust of this research was exploratory and consequently a descriptive case study design was employed. In-depth, unstructured interviews were carried out with eight educational leaders who had relinquished position in the contexts of New Zealand State Secondary Schools and Private Training Establishments, and chosen to continue working within these same contexts. Stories capturing this experience were crafted from verified transcripts, and the subsequent analysis drew on the tradition of hermeneutic interpretation (van Manen, 1990) with both individual interpretations offered, and the shared meaning of the experience articulated in the form of essential themes.

The key thematic findings which emerged in this study were those of a sense of the a-lone-ness of leadership; the apparent ready-suddenness of the decision to step aside, the seeking of both a work-life and work-work balance in the relinquishing of position; a powerful sense amongst leaders of a re-turning to the call of teaching; and varying degrees of ease and dis-ease in the experience of letting go and holding on following positional relinquishment.

While supportive of some aspects of the findings of earlier leadership and role exit studies, notably those centring around isolation and balance, the findings of the current

study in many respects extended those of existing research, and offered previously undocumented understandings.

The Contribution of this Study

A major contribution of this study is that it begins to fill the clearly identified gap in the literature created by a lack of investigation of the experience of voluntarily relinquishing position yet remaining in the same workplace. This is of significance for at least two reasons.

Firstly, the current study serves to acknowledge and value an experience of individuals which appears, up until now, to have been overlooked. As one participant pointedly remarked "It's a story that needs to be told – nobody ever asked me" (Interview three). Thus, the present study makes a contribution in doing both the asking for, and the telling of, these stories. Participant voices have been deliberately honoured in the research through the process of the crafting of stories using the participants' own language, and in the decision to present the unique experience of each individual in the first of two findings chapters.

Secondly, the attention paid to the experience of voluntarily relinquishing position yet remaining in the same workplace in this study also has significance at an institutional level. In light of the widely documented concern around the turnover and early exiting of leaders (Bottery, 2004; Brooking, 2007; Fullan, 2007; Hargreaves & Fink, 2006; Stevenson, 2006), the current study contributes to a deeper experiential appreciation of the tensions of leadership. While it has certainly not been the intent of this study to identify institutional 'solutions' to leadership 'problems', the findings here, notably in the areas of a-lone-ness and the seeking of balance, may serve to highlight the nature of the environment in which leadership is currently practised, and in turn offer implications for institutions seeking to retain their leaders. If indeed the leadership crisis referred to by some commentators (Brundrett & Rhodes, 2006; Gronn, 2003; Hargreaves & Fink, 2006; Hartle & Thomas, 2003; Stevenson, 2006) is to be taken seriously, then studies such as this can extend the largely quantitative and pragmatically focused research base in this area by offering a richer experiential perspective.

A further contribution of the present study, and one that has potential implications for practice, centres around the place of the anticipation of letting go and holding on in the

relinquishment experience. If, as suggested in the current research, the forming of anticipation and the fulfilment or otherwise of these anticipations is significant in the ease of the experience, then in practical terms it is of value to consider how these anticipations may be communicated in the workplace. What, for example, is the forum for such a communication? While we may be familiar with the notion of an 'exit interview', employed in some organisations when staff resign or retire, should there be a consideration in our educational institutions of the provision of a formalised 'stepping aside interview' where the staff member is not in fact exiting but relinquishing one position and retaining another? Such a forum could allow for the overt articulation of the anticipations of letting go and holding on, and seek to address how these might be worked out in practice. If such a forum were to be established, additional consideration would need to be given as to who might be involved. Should, for instance, the immediate successor be included? These are decisions for educational institutions to make, but regardless of the degree of formality, the current study appears to suggest that the openness and clarity with which the anticipations of former position holders are able to be expressed, and the degree to which they are acknowledged in practice, has a significant bearing on the 'success' of the transition.

An additional area of contribution of this study may be found on a more personal level in the challenging of my pre-understandings and 'prejudice' (Gadamer, 1995), as a researcher. As indicated in Chapter Three of this report, the methodology of this study included the process of self-interview to allow for the identification of researcher bias. While my pre-understandings with respect to relationship, the conflict between 'business' objectives and 'educational' objectives, and the sense of awareness of the personal cost of leadership appear to be borne out in the emergent themes of this study, there has been a shifting of position with regard to my remaining assumption. In the light of the experience captured in the current study, that the stepping out of leadership yet remaining in the same workplace involves a necessary and sometimes awkward renegotiating of 'place' now appears inadequate. In particular, it is acknowledged that the act of voluntarily stepping aside can be more than just awkward, and indeed, that it can involve a very powerful emotional response. My pre-understandings as the researcher underestimated the strength of this emotional response that may be experienced in a voluntary decision to relinquish position, and have subsequently shifted.

Finally, as a deliberately exploratory investigation, a significant contribution of this study is in the opening of potential new avenues for further research. Through the employing of a descriptive case study design in combination with hermeneutic analysis, it was intended to establish as rich and experiential a platform as possible in this unstudied area. In providing this descriptive platform, it is unashamedly acknowledged that the current study serves to raise at least as many questions as it may answer, and in this respect, offers a 'jumping-off point' for future lines of investigation. Several such directions for future study are highlighted in a subsequent section which is intended to be indicative, rather than exhaustive, of all the possibilities.

Limitations of the Study

In assessing the limitations of this research it is worthwhile to consider that both the intent and design of the study emphasised *the experience* of stepping aside from position and remaining, rather than the particularity of *the position* one had stepped from and to. Hence, in the process of selecting and inviting leaders to participate, no parameters regarding the 'level' of former positions were imposed; what was crucial was simply that the participant had had an experience of voluntarily relinquishing this position and remaining in the workplace. Potential participants were recruited using a snowball sampling technique and it is acknowledged that the resulting group of participants has the potential limitation of not including any secondary school principals. This is not regarded as weakness in itself as the primary intent to capture the experience of a shift has been achieved. However, it is noted here that the experience captured in this study was not drawn from the stories of principals and therefore may not necessarily be reflective of their experience. This is a point which will be returned to in the recommendations for further research.

A second, and obvious, potential limitation of this study was that of sample size. In evaluating the impact of this limitation, it is important to recognise that this study was not attempting to identify correlations, to make statistically valid generalisations or to generate theory. In this respect, then, the number of participants was not an overriding methodological concern. However, were more time and resources available, it is suggested that engaging with a larger sample would be of benefit in allowing for a greater depth and diversity of experience to be captured.

Recommendations for Further Research

As signposted at various points in Chapter Six, the current investigation leads to a number of possibilities for future study. These prospects for further research are inclusive of, but certainly not limited to, the recommendations outlined below.

The findings of the current study with regard to both the experiencing of a-lone-ness and the impact of stepping aside on identity began to raise the possibility of a potential distinction between aspects of the experience of middle and upper level leaders. These areas require a much greater degree of research before any substantive claims may be made. It is therefore recommended that larger scale study, with a purposive sample deliberately including a mix of principals and middle level leaders, be carried out. Such study might serve to confirm the tentative distinction emerging here that for upper level leaders, as shown in previous studies (Cranston, 2002; Harold, 1999; McInerney, 2003), there is an experiencing of a-lone-ness in finding themselves in a context seemingly requiring increasing decision-making alone, while for middle level leaders there is a sense of isolation in being unable to influence this very decision-making process. Further research involving both principals and middle leaders may also shed light on the potential link between the level of position relinquished, the impact on sense of identity, and the ease of the experience of relinquishment. Posed another way, such research might specifically seek to explore connections between the magnitude of the step aside and the ease and dis-ease of experience.

A second prospect for greater investigation may be found in the area of the experience of a re-turn to the call of teaching. While the current findings do strongly suggest teaching to be experienced as a calling, and that in the stepping out of leadership there can be a powerful and welcome sense of re-turn to this calling, further study to explore whether an *involuntary* shift back to teaching is experienced as positively would be of value. In particular it is recommended that comparative studies investigating the experience of involuntary relinquishment, triggered for instance by the completion of a fixed term contract or originating in the processes of restructuring, be carried out. Studies of this nature may serve to provide further insight into the strength and ubiquity of the call to teach amongst educational leaders and, in addition, offer understandings as to whether the welcome-ness of re-turn found here is indicative of a calling or the voluntariness of the relinquishment process.

A further significant area offering a number of avenues for future research is that of the consideration of the ongoing expression of leadership through formal or informal roles *after* having stepped aside from position. If Hargreaves and Fink (2006) are correct in claiming that "sustainable leadership needs a rearview mirror as well as a driver's windshield" (p. 49), and that we ought not to overlook past experience and learning, the possibilities, for instance, of recognised within-organisation mentoring roles for leaders who have relinquished position require further attention. Certainly the prospect of such roles would appear to be line with calls for the approaching of mentoring with increased seriousness in our educational institutions (Beattie, 2002; Hargreaves & Fink, 2006; Matters, 2008). Steps have already begun to be taken within New Zealand in the formalising of the provision of mentors for emerging educational leaders through programmes such as the First-time Principals Programme (The University of Auckland, 2003). These mentors typically are experienced or retired principals who, in this regard, offer what may be thought of as an 'external' mentoring presence. What might be the potential value of engaging mentors who know, and continue to remain in, the specific workplace in question, both for the supported and the supporter?

It is not suggested here, however, that such 'internal' mentoring roles would be necessarily unproblematic and as Matters (2008) and Hargreaves and Fink (2006) observe, the 'success' of mentor/mentee relationships often appears to rest on the voluntary or self-selected nature of the relationship. This would be an aspect requiring further close attention, particularly when the participants in the mentoring relationship are both within the same workplace. In addition, it is worthwhile considering Gronn's (2003) notion of the 'shadow' of the former incumbent. This "ghostly presence" (p. 140), as he describes it, is created by the departure of a leader and lingers to cast a shadow over the successor. Gronn (2003) suggests examples of these shadow effects to range from the benign, where the former leader deliberately attempts to minimise the length of the shadow cast, to the rather less so where predecessors actively express their concerns regarding their successor. Questions may be asked as to whether the length of this shadow might be affected by the predecessor remaining in the workplace, and how this may potentially impact on possible mentoring relationships. Further research into the realm of internal mentoring roles for leaders who have stepped aside would be of much value and needs to address such questions. In particular, it is strongly recommended that baseline studies mapping the experience of current leaders who have

former leaders still remaining within their workplaces, be carried out as an essential starting point to exploring the benefits or otherwise of internal mentoring arrangements.

An additional avenue worthy of further research arising from the recognition of the ongoing expression of the being of leader might be around Rhodes, Brundrett and Nevill's (2008) calls for a heightened awareness of the identification and nurturing of emerging leaders within an organisation. This increased interest in the "growing of one's own leaders" (Rhodes, Brundrett, & Nevill, 2008, p. 331) appears largely to be in response to the widespread concern over what some have called a leadership crisis, and the issues of sustainability and succession (Brooking, 2007; Fink & Brayman, 2004; Gronn, 2003; Hargreaves & Fink, 2006; Hartle & Thomas, 2003; Rhodes, Brundrett, & Nevill, 2008). While this study has actively sought to focus on human lived experience rather than institutional implications, if indeed "few things in education succeed less than leadership succession" (Hargreaves & Fink, 2006, p. 57), it would appear that closer investigation of the potential roles of former leadership holders in the identification and growth of new leaders might be of both individual, and institutional, benefit.

Finally, as has already been noted, while the current study does not intend to provide extensive coverage of the increasingly heavily researched area of distributed forms of leadership, it is suggested here that the ongoing expression of the being of leader following a positional relinquishment may offer implications in this regard, and present yet a further avenue for future investigation.

Concluding Remarks

In concluding this report it is useful to return to the centrality, and seeming metaphoric paradox, of the act of leaving the ship but staying on board. This study has clearly shown that this apparent paradox is a lived reality for a number of educational leaders and, to push the metaphor a little further, that the embodied experience may not all be 'plain sailing'. As evident in the stories represented in this study, the experiences of stepping aside from leadership position yet remaining in the workplace can be challenging and joyous, rewarding and hurtful, shared and unique. These very experiences remind us, if we let them, that leadership and leading is something more than a job description with a title, and that the stepping aside from position is no less humanly significant.

In times predominantly focused on the systemic pragmatism of leadership succession, and where the scant attention to leaders who exit seems framed within prescribed models, the richness and depth of human experience has been overlooked. This study, therefore, has served to foreground and celebrate this experience as it is lived, and issues a challenge for a greater recognition of the human both in the holding, and relinquishing, of leadership position.

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Appendix A: Participant Information Sheet

Participant Information Sheet

Date Information Sheet Produced: 13 October 2007

Project Title

Leaving the ship but staying on board: A multiple case study of the voluntary shift from the position of leader to teacher within the same educational institution

An Invitation

Hi! I am an Economics and English teacher, who is also currently studying at Auckland University of Technology. As a teacher and former Head of Programme myself, I have noticed an increasing trend for people to make a decision to step aside from their position of leadership in order to continue to teach in the same workplace, and I am very interested in this experience. I am carrying out some research for my thesis which will contribute to a Master of Education qualification, and would like to invite you to participate in this. The purpose of this invitation is to give you some details about the project, and what it involves so that you may decide whether you are interested in participating by sharing your experience. Of course participation is completely voluntary and you may withdraw from the research at any time up until the completion of the data collection phase.

What is the purpose of this research?

This research will be used in the production of a thesis for the Master of Education, and may result in other publications.

How was I chosen for this invitation?

You have been invited to participate in this research as you have voluntarily stepped aside from the title of leader, and continue to teach within the same post-primary educational workplace in the Auckland region.

What will happen in this research?

This project takes the form of a multiple case study, so I will be asking a number of people from a number of educational institutions, to talk about their experience of making the shift from the position of leader to teacher in the same workplace. If you choose to participate in this project, I would like to interview you at a place and time

which is convenient for you, and because everyone's experience is unique, the interview will be designed to provide a full opportunity for you to describe your own experience in a way that suits you, rather than relying on a set of prescribed questions to answer. The interview will be recorded and transcribed and I will send you a copy of the transcript to make sure that you are comfortable with its accuracy and what has been said. I will use the stories and experiences that you recount to build up a rich picture of what it is like to step aside from leadership but stay in the same workplace, and this will be presented in the form of a thesis report.

What are the discomforts and risks and how will these discomforts and risks be alleviated?

Having an interview recorded by audiotape can sometimes feel uncomfortable initially, but as you can choose to have the interview at a place and time which is the most comfortable for you, this will help to put us both at ease.

During the interview there is the possibility that you might want to talk about experiences which involve people that you still work with. This may also make you feel uncomfortable or perhaps not sure as to whether to talk about these experiences or not. I would like you to know that it is completely your decision as to what you choose to share with me and if at any time you begin feel uncomfortable, the interview may be terminated at your request. If the interview raises any issues for you that you would like to talk about with a professional counsellor, I can also help you to get in touch with AUT Health and Counselling (ph. 09 921 9998) at the Akoranga Campus. In order to protect your privacy, the final report will not have any names or identifying features contained in it. The interview will be transcribed by an independent professional transcriber who has signed a confidentiality agreement stating that they will not discuss their work, and you will receive a copy of the transcript to which you may make changes if there is anything that you are uncomfortable about. Even my research supervisors will not see any information that has the names of people or organisations included, in order to protect your privacy.

What are the benefits?

The benefit of this study is to give 'voice' to your experience of the career choice to shift from position of leader to teacher. This is an area of experience which has not been widely studied and so your participation will help to give a fuller picture. The project may also provide an enhanced insight into the pressures on educational leadership, the possibility of a deeper perception of ways to nurture both leaders and teachers, and a greater understanding of transitional processes involved in role shifts in education.

What are the costs of participating in this research?

The cost of participating in this research will be your time only. The interview is expected to take a maximum of 45 to 60 minutes, and the checking of the transcript may take another 15 to 30 minutes. All together, the cost to you will be about 75 to 90 minutes of your time.

What opportunity do I have to consider this invitation?

Please think about the invitation to participate in this research and I would very much appreciate being able to contact you again in one week for your decision.

How do I agree to participate in this research?

If you are willing to participate in this research you will need to sign a consent form which I will make available to you either by post or personal delivery, whichever is the more convenient for you.

Will I receive feedback on the results of this research?

Yes, a summary report will be provided to you by postal mail at the completion of the project. A copy of the full report will also be made available if you are interested.

What do I do if I have concerns about this research?

Any concerns regarding the nature of this project should be notified in the first instance to the Project Supervisor, Dr. Richard Smith at richard.smith@aut.ac.nz or ph. 9219999 ext 7935

Concerns regarding the conduct of the research should be notified to the Executive Secretary, AUTEC, Madeline Banda, *madeline.banda@aut.ac.nz* , 921 9999 ext 8044.

Whom do I contact for further information about this research?

Researcher Contact Details:

Ian McLeod, Ph. 021 212 4456, Email: mycloud66@yahoo.com

Project Supervisor Contact Details:

Dr. Richard Smith, ph. 9219999 ext 7935, email: richard.smith@aut.ac.nz

Approved by the Auckland University of Technology Ethics Committee on 9 November, 2007, AUTEC Reference number 07/156.

Appendix B: Consent Form

Consent Form

Project title: **Leaving the ship but staying on board: A multiple case study of the voluntary shift from the position of leader to teacher within the same educational institution**

Project Supervisor: ***Dr. Richard Smith***

Researcher: ***Ian McLeod***

- ○ I have read and understood the information provided about this research project in the Information Sheet dated 13 October, 2007.
- ○ I have had an opportunity to ask questions and to have them answered.
- ○ I understand that notes will be taken during the interviews and that they will also be audio-taped and transcribed.
- ○ I understand that the transcription of audiotapes will be done by a professional transcriber who has signed a confidentiality agreement.
- ○ I understand that I may withdraw myself or any information that I have provided for this project at any time prior to completion of data collection, without being disadvantaged in any way.
- ○ If I withdraw, I understand that all relevant information including tapes and transcripts, or parts thereof, will be destroyed.
- ○ I agree to take part in this research.
- ○ I wish to receive a copy of the report from the research (please tick one): Yes○ No○

Participant's signature:
.....

Participant's name:
.....

Participant's Contact Details (if appropriate):

……..

……..

Date:

Approved by the Auckland University of Technology Ethics Committee on 9 November, 2007. AUTEC Reference number 07/156

Note: The Participant should retain a copy of this form.

Appendix C: Transcriber Confidentiality Agreement

Confidentiality Agreement

Project title: **Leaving the ship but staying on board: A multiple case study of the voluntary shift from the position of leader to teacher within the same educational institution**

Project Supervisor: ***Dr. Richard Smith***

Researcher: ***Ian McLeod***

- I understand that all the material I will be asked to transcribe is confidential.
- I understand that the contents of the tapes or recordings can only be discussed with the researchers.
- I will not keep any copies of the transcripts nor allow third parties access to them.

Transcriber's signature:

.....……

Transcriber's name:

.....……

Transcriber's Contact Details (if appropriate):

……..

……..

Date:

Project Supervisor's Contact Details (if appropriate):

……..

……..

Appendix D: The Story Crafting Process

Excerpt from Interview Transcript One

IM So it sounds like part of the decision to move to teaching was perhaps a life outside and having more time for that?

Participant Um, it didn't quite happen like that actually, um, in the build up to my resignation … So I resigned two days after Christmas - two days back after the Christmas break - and in the build up to that, from September through to December, the school had been exceptionally busy. We'd had much higher than expected numbers, we'd had a Korean group of 110 on top of the normal student numbers, and I had no extra support despite constantly asking for it. I was told I had to write down and justify why I needed the extra support, which was just … I mean, I found that insulting! Um, maybe that is procedure but can't you see, we've got 400 students - of course I need extra support and I haven't really got time to write down a proposal, you know - why can't you see? So, you know, the Principal has all these little, um, little techniques which I guess she's learned on her MBA, or whatever she's done. You know, stalling techniques: the budget, the budget - the budgets don't do that … well, get the budgets to teach if they're so bloody clever! Um, so, the budget at the faintest excuse … Writing things down was another excuse, and these were just barriers when what I actually needed was "Yes, we can see you're really busy, let me, um, let's solve this problem together." And it was all like, well, "I need to take this to Head Office" and, um, it was very good at diffusing the immediate need but it didn't help me at all long term. And eventually it came down to, "Well sorry, that's the job", you know, "That's what the job is" and she started telling me this, and when I heard that, I thought, "Well, that's very clear", and ironically now the job … the job now is being done by five separate people.- but that's jumping ahead. I didn't think about the teaching aspect, it didn't even cross my mind, um, and I didn't plan to resign when I did, it was just, when I came back after Christmas, such a … We were back in with 110 new students, and it was well organised because I'd organised it really well - whilst everyone else was enjoying the week off after Christmas, I was in my office with my brain bleeding, trying to organise everything for the week after. So my build up to Christmas was horrific and the first week back was also horrific, and again, there was no evidence of support from the company, just that that was the job … what they expect you to do. And I'm not someone who can hide my feelings, so I was probably walking around with a face like thunder and, you know, if something was really out of order, I would articulate it and I know that wasn't appreciated by the Principal on a number of occasions, but I think, you know, people were walking round who were afraid to say stuff, and people walking round pretending bad things aren't going on – I can't live like that.

IM And so that was all part of the build-up?

Participant That was part of the build-up, yeah, it was just increasingly stressful and you know, teachers were coming up and going, you know, "I wouldn't like your job for all the tea in China, God, I wouldn't!" And teachers I think really started sympathizing with me and started telling me what they really felt, and they'd felt this all along and I think when they could see I was really struggling - and I was trying really really hard - even the teachers … that was their way of trying to show some support as it was such a hard job. So I resigned, and I thought I … [*The principal*] said "Look, it doesn't seem to be going very well", and I thought "This is ridiculous, you know, it's really busy and I'm not getting any job satisfaction at all" and she had obviously thought about this and asked me if I wanted to resign and I said "Yes", I just couldn't hold back. I didn't plan to say yes, but when she said that, I said yes. And she said, "Well maybe [*X, a previous leadership position holder*] who was still teaching there – although she did have [*some health issues*] – um … she was still there, and [*The principal*] had obviously lined it up with her to some degree although she claimed she hadn't … but by the end of the week, she'd taken over my job. And when I talked to [*The principal*] and resigned verbally, she said "Would you like to be a teacher here?" and I instinctively said "Yes, I'd love that, without even thinking about it."

Selected Quotes

In the build up to that, from September through to December, the school had been exceptionally busy. We'd had much higher than expected numbers

I had no extra support despite constantly asking for it. I was told I had to write down and justify why I needed the extra support, which was just … I mean, I found that insulting

I hadn't really got time to write down a proposal

The Principal has all these little, um, little techniques which I guess she's learned on her MBA or whatever she's done. You know, stalling techniques: the budget, the budget - the budgets don't do that … well, get the budgets to teach if they're so…bloody clever!

I didn't think about the teaching aspect, it didn't even cross my mind, um, and I didn't plan to resign when I did

[*The principal*] said "Look, it doesn't seem to be going very well", and I thought this is ridiculous, you know, it's really busy and I'm not getting any job satisfaction at all and she had obviously thought about this and asked me if I wanted to resign and I said yes, I just couldn't hold back. I didn't plan to say yes, but when she said that, I said yes

By the end of the week, she'd taken over my job. And when I talked to [*The principal*] and resigned verbally, she said "Would you like to be a teacher here?" and I instinctively said "Yes, I'd love that, without even thinking about it."

Crafted Story Exemplar

In the build up to my resignation, from September through to December, the school had been exceptionally busy. We'd had much higher than expected numbers and I had no

extra support despite constantly asking for it. I was told I had to write down and justify why I needed the extra support, which I just found insulting. I hadn't really got time to write down a proposal and the Principal was using all these little stalling techniques - the budget, the budget - and I thought "Well, get the budgets to teach if they're so bloody clever!" I didn't think about returning to teaching, it didn't even cross my mind, and I didn't plan to resign when I did. I just thought this is ridiculous, it's really busy, I'm not getting any job satisfaction at all and when [*the principal*] asked me if I wanted to resign I said yes, I just couldn't hold back. I didn't plan to say yes, but when she said that, I said yes. By the end of the week, my successor had taken over my job and when I had talked to the Principal and resigned verbally, she had said "Would you like to be a teacher here?" and I had instinctively said "Yes, I'd love that", without even thinking about it.