

Ontario Principals' Council
International Symposium White Paper
**Principal Work-life Balance
and Well-being Matters**



FOREWORD

This White Paper, *Principal Work-life Balance and Well-being Matter* presented by the Ontario Principals' Council (OPC) and International School Leadership (ISL), details the insights of presenters and participants at the Third International Symposium in November 2016, and describes the work of the broader global research community on leadership well-being and work–life balance. This document is intended to promote discussion among policy-makers and system and school leaders, and support the work of professional associations.

The OPC is a voluntary professional association that has represented practising principals and vice-principles in publicly funded Ontario schools since 1998. It provides its members— over 5,000 school leaders from the elementary and secondary panels — with the professional services and supports they need to demonstrate exemplary leadership in their schools and learning communities. The OPC operates within the ethical guidelines of the Ontario College of Teachers. For more information about the work of the OPC, please visit: <http://www.principals.ca>.

International School Leadership is a subsidiary of the OPC, and adapts the OPC's globally recognized professional learning opportunities and management training for international partners in government and education. For more information about the work of ISL, please visit: <http://www.internationalschoolleadership.com>.

The OPC would like to acknowledge the exceptional leadership and commitment of Dr. Katina Pollock and Dr. Karen Edge, who wrote this White Paper after collaboratively facilitating the Third International Symposium. The OPC also wishes to acknowledge the contributions of more than 70 delegates from across Canada, including representatives from Ontario, British Columbia, Newfoundland and Labrador, and Manitoba, and international colleagues from Australia, Finland, Ireland, Italy, Slovenia, the United Kingdom and the United States of America. Their thoughtful contributions and wealth of experience invaluablely shaped the discussion and insights presented in this White Paper.

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THIRD ANNUAL OPC INTERNATIONAL SYMPOSIUM WHITE PAPER: PRINCIPAL WORK-LIFE BALANCE AND WELL-BEING MATTER

EXECUTIVE SUMMARY

In November 2016, delegates from over 32 school leader associations (SLAs) from across the globe participated in the third Annual International Symposium on the Role of Professional Associations for School Leaders held in Toronto, Ontario. The symposium explored research on work intensification, generational theory and its influence on principal work and aspirations, and work-life balance and well-being.

This White Paper draws on the work of the symposium and the wider evidence base to argue that we currently face a crisis in principal well-being on a global scale that, without urgent policy and practice intervention, will impact school- and system-level outcomes for generations. We argue for the importance of national and local recognition and understanding of the current status of principal well-being and work-life balance, highlight the factors and conditions that impact the work of principals with implications for well-being and work-life balance in the role, and proffer strategies and interventions that SLAs can undertake to enhance and promote principal well-being.

...a crisis in principal well-being on a global scale.

School leaders have an influential and essential role in securing student academic and personal success, creating the conditions required for school improvement by acting as ‘lead learners’, focusing intently on the quality of teaching and learning. Yet there is growing evidence of a global transformation in the roles and nature of principal work (UNESCO 2009; OECD 2003, 2008) shaped by global patterns of educational reform over the last decade (Fullan 2008; Evans 2016; Edge 2016), the rapidity of innovation in information and communication technology (ICT) and its integration into the work and personal lives of educators and students (Dibbon & Pollock 2007; Gurr 2004, 2000; Pollock & Hauseman 2017; Pollock 2015; Carroll 2010), and the growing diversity (and growing awareness of diversity) of student populations and student needs (Ryan 2006; Briscoe & Pollock 2017; ATA 2014; Pollock, Wang & Hauseman 2015).

The resulting escalation in workload brought about by these shifts has been described as “principal work intensification” – a phenomenon defined by an increasing volume and complexity of school leaders’ work, roles and responsibilities (Pollock 2014, 2015, 2016; Pollock, Wang & Hauseman 2015). Principals in several jurisdictions are reporting term-time work hours between 50 and 65 hours a week (Riley 2013, 2014, 2015; Bristow, Ireson & Coleman 2007; Alberta Teachers’ Association 2014). In a 2012 MetLife Foundation principal survey “75 percent of the respondents said that the job had become too complex,” creating undue stress (Pollock et al 2012, p. 3). Work intensification hinders the development and sustainable healthy work-life balance, with significant implications for principal well-being (La Placa et al 2013) and subsequently the well-being of schools and school systems.

...intended and unintended consequences.

Globalization, demographic changes, growing global awareness of social equity and human rights issues, and rapid technological innovation create a demand and pressure on public education systems to respond and adapt. Over the last decade, educational change in many jurisdictions has been characterized by a rapid flow of initiatives designed to improve student outcomes. These shifts are occurring against a backdrop of structural and funding pressures that demand increased flexibility and creativity from school leaders, without a concomitant increase in, and at times a reduction of committed resources (Auerbach 2012; Barr &

Saltamrsh 2014; Ontario Ministry of Education 2010; People for Education 2012; Sanders 2014; Wallace Foundation 2013). The constant pressure to adopt new programs, a lack of alignment between reforms, and competing accountability systems for different initiatives all contribute to work intensification and negative well-being outcomes for school leaders.

Under these conditions, the increasing challenges to principal work-life balance and well-being are creating multifaceted implications for schools and school systems. The principalship is an increasingly undesirable position for prospective *and* current administrators, creating issues of both recruitment and retention across systems (Leithwood & Azah 2014a, b). Simultaneously, current school leaders find themselves pulled away from instructional leadership, with time increasingly co-opted by operational, accountability and administrative demands created by misaligned system-level priorities (SPEF 2015; The Human Cost 2014; Riley 2014).

...support and advocacy, practice and decision-making.

SLAs play an important role in addressing these pressures, acting as knowledge brokers, advocates and policy activists for the well-being of their constituents. Globally, SLAs are developing strategies to support their members' well-being and advocate for better approaches to work-life balance. Building on the current best practices and experience of symposium participants, this White Paper makes several recommendations for areas of advocacy and operational support that address the unintended consequences arising from the pace and scale of education reform, the growing centrality of ICT, and the changing nature of the principals' role. These recommendations fall into four key categories:

- Jurisdictional policy advocacy
- Redefining the principals role
- Advocacy for school- and system-level support and
- Delivery of support and development opportunities.

The applicability of specific recommendations depends on local and national context, SLA jurisdiction, mandate and membership structure. Importantly, while SLAs can act as advocates for policy change, work to share resources, and offer continued professional learning, coaching and mentoring for their members, the challenge of addressing principal well-being and work-life balance extends beyond principals and their professional associations: it rests in the hands of policy makers and school systems.

TABLE OF CONTENTS

INTRODUCTION	1
SECTION 1: The Current State of School Leader Well-being and Work–life Balance	2
The Problem: The Principalship has Become Undesireable	2
This White Paper:The School Leader Well-being and Work–life Balance Imperative	3
How is the Issue of School Leader Well-being Impacting Schools and the School System?.....	4
Evidence of the Problem: What Did We Learn From the Symposium?	6
SECTION 2: The Changing Nature of School Leaders’ Practice	8
Education Trends	8
SECTION 3: Solutions for School Leader Association Strategies for Supporting Principal Well-being and Work-life Balance	11
Understanding Global Approaches to Supporting Leaders:	11
Examples from Participating School Leader Associations.....	11
SECTION 4: Recommendations for School Leader Associations	13
School Leader Associations as Jurisdictional Policy Advocates	13
School Leader Associations as Advocates for Redefining School Leaders Roles	14
School Leader Associations as Advocates for School and System-level Support	15
School Leader Associations as Key Orchestrators of Support and Development Opportunities	15
School Leader Associations Spearheading or Collaborating on Workload and Well-being Data Gathering	18
CONCLUSION.....	19
References	20

INTRODUCTION

The purpose of the Third International Symposium in November 2016, for global leaders of school leader organizations was to dialogue, debate, and learn from each other to:

- interrogate key assumptions about the current state of well-being and work-life balance among school leaders (generally principals and vice/deputy principals),
- identify the key issues and challenges facing school leaders' well-being and the impact on schools and school systems,
- brainstorm solutions for school leader associations and strategies for supporting well-being and work-life balance for their members,
- Share activities to reflect on collective realities (contexts) and define new possibilities for supporting school leaders.
- Discuss and document, through the facilitation efforts of researchers, Dr. Katina Pollock and Dr. Karen Edge, the dialogue and recommendations from the participants, based on their extensive experience and expertise
- Identify recommendations for school leader associations that fall into four advocacy areas: jurisdictional policy advocacy, redefining the principals' role, advocacy for school- and system-level support and delivery of principal support and development opportunities. The recommendations will have varying degrees of relevance and opportunity according to the professional associations' context.

As a result of the Third International Symposium, there was a clearer understanding of challenges and characteristics of the changing nature of leaders' work and the perceptions of work-life balance and well-being related to the complexities in their role. This white paper presents a synopsis of the global research on the topic of leadership well-being and work-life balance realities and challenges. The paper attempts to share an understanding of the global approaches to supporting leaders and provides examples from participating school leader associations.

SECTION 1

THE CURRENT STATE OF SCHOOL LEADER WELL-BEING AND WORK–LIFE BALANCE

The Problem: THE PRINCIPALSHIP HAS BECOME UNDESIREABLE

School leaders have an influential and essential role in securing student academic and personal success (Leithwood, Sun, & Pollock, 2017). School leaders create the conditions required for school improvement by focusing intently on the quality of teaching and learning. In many countries, however, system- and school-level emphasis on accelerating student learning has placed increasing pressure on teachers and leaders. School-level educators are being asked to do more with, at times, fewer resources. This escalating pressure is starting to have a profound effect on the profession.

While practising principals find fulfillment in their jobs (Alberta Teachers' Association [ATA], 2014; Bristow, Ireson, & Coleman, 2007; Canadian Association of Principals [CAP], 2014; Catholic Education in Western Australia, 2015; Leithwood & Azah, 2014ab; Metlife Foundation, 2012; Pollock, 2014, 2016; Pollock, Wang, & Hauseman, 2015; UK Department of Education, 2014) growing global evidence suggests the principalship is becoming a less desirable position for both prospective and current administrators (Doyle & Locke, 2015; Fink & Brayman, 2006; Pollock, 2014; Sugrue, 2015; Riley, 2013, 2014, 2015; Russell & Sabina, 2014). Recognized as early as the 2000s, OECD (2003, 2008) and UNESCO (2009) noted the changing role of the principalship, which continues apace today. Globally, state-funded school principals have discussed ongoing shifts in the needs and diversity of their student populations, including mounting student discipline and mental health issues (Catholic Education in Western Australia, 2015; Riley 2013, 2014, 2015; Pollock, 2015, 2016; UK Department of Education, 2014). These demographic changes and the resulting demands are occurring against a backdrop of structural and funding pressures that require greater school-to-school collaboration, instructional leadership, external partnerships, and parental engagement (Auerbach, 2012; Barr & Saltmarsh, 2014; Ontario Ministry of Education, 2010; People for Education, 2012; Sanders, 2014; Wallace Foundation, 2013).

While national and local contextual factors dictate the shape and scope of the principalship, the changing nature of principal work has unprecedented influence. The most significant subsidiary effect of these shifts is the pressure on workload. While the local context of principal work differs greatly, global patterns indicate that principals spend more time on accountability and paperwork (Forde & Torrance, 2016; Pollock, 2015; Pollock & Winton, 2015; Volante, 2012); information and communication technologies, such as email and text messaging (Haughey, 2006; Pollock, 2014, 2015, 2016.); and managing concerns related to mental health and well-being (Poirel, Lapointe, & Yvon, 2012; Pollock, 2014, 2015, 2016). This escalation of workload has been aptly described as principal work intensification (Pollock, 2014, 2015, 2016; Pollock & Hauseman, 2016; Pollock, Wang, & Hauseman, 2015).

Throughout this paper we use the terms principal and school leader interchangeably to refer to the broad range of roles in schools and school-systems around the globe defined by a responsibility for the administrative and operational management of schools, supervision and evaluation of teachers/instructors and pedagogical and instructional leadership towards school improvement. Where a specific national/regional context is being discussed, the language specific to that region is used to reference the school leader role (i.e. head teachers in the United Kingdom or principals and vice-principals in Canada).

A growing body of research evidence is charting the rise in principal work intensification. In Australia, Riley (2013, 2014, 2015) has led extensive studies into principal work, uncovering an escalation in principal term-time work hours between 2011 and 2015. During this time, the number of principals reporting working 51–56 term-time hours rose from 70% to 76%. In 2011, 24% of principals worked upwards of 61–65 hours per week. Similar patterns have been observed across the globe. For example, headteachers in the United Kingdom have recently reported working 63.3 hours per week (UK Department of Education, 2014). This represents a 10 hour per week increase since 2007 (Bristow, Ireson, & Coleman, 2007). Similarly, in the Canadian province of Ontario, public school principals reported working 58.7 hours per week, with 72% of them feeling pressured to work long hours (Pollock, 2014; Pollock, Wang, & Hauseman, 2015). Research conducted in the Canadian province of Alberta has found principals are working an average of 58.5 hours per week, well above the standard 40-hour work-week (ATA, 2014). A total of 86.5% of principals in a jurisdictional survey conducted in the United States indicated that they never have enough time to

complete all of their work. Similarly, the MetLife Foundation’s 2012 principal survey has reported that “three-quarters of all principals say that job has become too complex, and nearly half report feeling under great stress” (p. 3). Work intensification is not only increasing the amount of time principals spend at work, but is also increasing the complexity of their roles and responsibilities.

The overwhelming impact of work intensification on leaders is multifaceted. In 2008 and 2009, cross-national UNESCO and OECD studies recognized a pattern of principals’ “time famine,” attributed to increased monitoring and assessment of learning achievement (UNESCO, 2008). This pressure has negatively influenced teacher professional learning, as principals allocate a higher proportion of their time to monitoring administrative tasks (UNESCO 2008; OECD 2009). More recently in Ontario, system- and district level stakeholders believe principal workload is “approaching, if not already exceeding, what can reasonably be expected even from a cohort of exceptionally dedicated school administrators.” (Leithwood & Azah, 2014a, p.93). Leithwood and Azah (2014a) also report that “it would be quite unrealistic to expect any principal... to have time left for engaging staff in school improvement” (p. 93).

For individual principals, work intensification challenges their personal efforts to develop and sustain healthy and meaningful lives beyond the school gates. As principal work–life balance suffers, overall principal well-being may become prey to the aforementioned volume and complexity of their roles. For the purposes of this White Paper, we define work–life balance as managing time and energy to achieve satisfying experiences in all aspects of one’s life with minimal conflict between and among an individual’s various personal and professional roles (Clark, 2000; Davi & Rani, 2012; Kirchmeyer, 2000; Fisher-McAuley, Stanton, Jolton & Gavin, 2003). More specifically, principal work–life balance relates to managing time, resources and energy between school leadership and all other personal and professional roles.

Work–life balance is connected to well-being. A positive healthy state of well-being can be realized when one achieves a manageable work–life balance. Overall, well-being can be defined as a state that occurs in the absence of any kind of physical, social, psychological, emotional, economic and cognitive distress (La Placa, McNaught & Knight, 2013).

Clearly, the work–life balance and well-being of school leaders is becoming an issue beyond individual and school concerns, but in many jurisdictions is an emerging issue for the recruitment and retention. The importance of principal work–life balance and well-being is now raising the alarm for school-, district- and system-level leaders to take action. The health and well-being of principals is vital to the current and future success of schools and entire school systems. As baby boomer principals continue their march toward retirement, often earlier than originally scheduled, there is growing pressure to recruit, develop and retain new leaders. As many jurisdictions are struggling to recruit teachers, the pool of potential leaders remains at risk. This struggle will be compounded by a generation of leaders who are increasingly at risk of not being able to deliver the mounting list of tasks resting on their desks. When teachers and aspiring leaders look ahead in their careers and see these challenges, they may become even less inclined to move into an administrative role (Edge, 2015; Pollock & Hauseman, 2016).

This White Paper: THE SCHOOL LEADER WELL-BEING AND WORK–LIFE BALANCE IMPERATIVE

The growing volume and complexity of principal responsibilities dovetails with increasing accountability measures and the ensuing pressures. These factors appear to be provoking a crisis in principal well-being on a global scale. Within this climate, the relationship between work intensification and well-being can no longer be ignored. We believe that without urgent policy and practice intervention, the current state of principal work and well-being will impact system- and school-level outcomes for generations. To get to the crux of the issue, it is important to begin with the impact of these conditions on leaders and the wider education systems in which they work.

More research needs to be done to fully understand the relationship between principal well-being and school, staff and student outcomes. We do know that, second to only teachers, principals have a significant influence on student success (Hallinger & Heck, 1998, Witziers, Bosker & Kruger., 2003; Marzano, Waters & McNulty 2005;

Robinson, Lloyd & Rowe 2008; Leithwood & Sun, 2012). As Robinson (2011) has illustrated in her book, *Student-Centered Leadership*, leaders can make an important and positive contribution to the achievement and well-being of their schools and students.

In November 2016, the third Annual International Symposium on the Role of Professional Associations for School Leaders brought together leaders of 32 global school leader associations to examine concerns and share strategies to address issues of workload, well-being and work-life balance. The 2016 International symposium theme was *Global Trends for All Generations: Exploring work-life balance and well-being* and explored research on work intensification, generational theory and its influence on principal work and aspirations, and work-life balance and well-being.

Drawing on work from the symposium and the wider evidence base, this White Paper argues that principals need to find ways to remain satisfied with their work lives and find balance and a sense of well-being if they are to continue making positive contributions to their schools and communities. However, this challenge extends beyond individual principals: it rests in the hands of school districts and systems at state-, province-, and national-levels, as appropriate. The role of the School Leader Association (SLA) is becoming even more important, as SLAs now function as knowledge brokers, advocates and policy activists for principal health and well-being.

In this paper, we argue for the importance of local and national recognition and understanding of the current status of principal well-being and work-life balance. We highlight the factors and conditions that impact the work of principals and the implications for well-being and work-life balance in the role. Building on our collective reflections and current research evidence, this paper outlines the intended and unintended consequences of the changing nature of formal school leaders' work in public education. Finally, we proffer strategies and interventions that professional associations can undertake to enhance and promote principal well-being.

HOW IS THE ISSUE OF SCHOOL LEADER WELL-BEING IMPACTING SCHOOLS AND THE SCHOOL SYSTEM?

Headlines in many cities, states and countries are decrying the urgent need to recruit and retain teachers (ACT, 2015; Sutchter, Darling-Hammond & Carver-Thomas, 2016). In many jurisdictions, the need for qualified and skilled teachers has reached a crisis point with vacancies reaching record numbers and posts going unfilled (Sutchter, Darling-Hammond & Carver-Thomas, 2016; UK House of Commons Committee of Public Accounts, 2016).

In these areas, current patterns of teacher recruitment and retention indicate that public education systems are set for increasing challenges in establishing and maintaining a suitable flow of able and committed education professionals to teach and lead future generation of students. The subsidiary effect of smaller pools of teachers will have significant influence on future principal recruitment. Fewer teachers will mean a decreasing pool from which aspiring leaders can be identified, nurtured and promoted.

Simultaneously, school leader work intensification is creating increased challenges for principals and aspiring principals to find a desirable work-life balance. In the general working population, overwork directly opposes well-being; this is also true for principals. As workload has escalated, the increasing challenges to work-life balance and well-being are manifesting themselves in several clear ways, including: decreasing teacher interest in school leadership roles—but not the certification; premature or early career retirements for new and experienced leaders; generational patterns in work experience and future aspirations; and regional differences in work lives and expectations of school leaders. We provide more detail on each of these subsidiary effects in this section.

Teacher disinterest in the role. Increasingly, teachers are expressing a lack of interest in taking on school leadership roles as excessive workload and misaligned system-level priorities create undesirable career paths. The Association of School and College Leaders (ASCL) survey in England found that few deputy or assistant heads are interested in stepping into head teacher roles (BBC, 2014). In Ontario, Leithwood and Azah (2014a, 2014b), commissioned by the Ontario Ministry of Education, studied both elementary principals' and vice-principals' workload and secondary principals' and vice-principals' workload. Their findings highlighted that principals see the expansion of the role and responsibilities as a major contributor to workload: "The role [of the principal] had

expanded and changed so dramatically and become all-encompassing that the role was not desirable” (Leithwood & Azah, 2014a, p. 80). As a result of work intensification, one of their respondents stated that, “Good principals and educators want to remain in the classroom as there is a negative perception about the workload associated with the role” (Leithwood & Azah, 2014a, p. 80). Teachers’ perceptions about the nature and extent of principal workload has considerably impacted their recruitment for school administration (Leithwood & Azah, 2014a, 2014b).

Interest in principal certification, but not the job. Due to this changing nature of principals’ work, some regions are experiencing an interesting trend. Looking at enrolment data, the number of teachers participating in school leadership certification programmes is remaining constant or increasing. However, it appears that the number of successful principal certification graduates stepping into leadership roles does not reflect this buoyant interest in the professional learning opportunity. This may demonstrate that the perceived value of leadership training is at odds with the perceived impossibility of the role.

Principals feeling pulled away from teaching and learning. While principals work in very different global contexts, there is rising concern about the growing volume and complexity of their roles. Riley’s (2014, 2015) Australia-based research identifies the “greatest stressors reported were sheer quantity of work and a lack of time to focus on teaching and learning” (Riley 2012, p. 50). Work intensification patterns lead to many principals working long hours, and this “elephant in the room” is increasingly being recognized as having significant implications for student-centered leadership in practice. For example, in Ontario, Leithwood and Azah (2014a) have advised: “We also need to be much clearer about how excessive workload demands might be ameliorated so that more time is available for leaders to focus on the challenges of school improvement” (p. 3).

Additional research conducted on principals in Ontario points to similar findings. For example, 86.5% of Ontario principals indicated that they never seem to have enough time to get their work done (Pollock, 2014). Further, 81.7% of Pollock’s (2014) sample reported that they were too busy dealing with managerial tasks to give instructional issues the time they deserve. From an Australian perspective, Riley (2012) summarized the consequences of workload stressors for student-centered leadership in practice: “Schools need to be managed, but the question of how much of the Principal’s time should be devoted to tasks for which no specific pedagogical skill is needed remains open” (p. 50). Unsurprising to many principals and school leader associations, the first recommendation of the Chicago Public Education Fund’s (CPEF) 2015 *School Leadership Report* relates to increasing principals’ time allocations for teaching and learning rather than overwhelming them with paperwork: “7 in 10 principals say reducing compliance is one of the top three ways to improve job satisfaction” (p. 6). In Chicago, principals reported feeling compliance pressures and less autonomy: “40-50% of principals feel unable to organize school resources in ways that advance school goals and priorities...” (CPEF, 2015, p. 6).

Early career principals leaving. In 2012, Rand Education examined the challenges and opportunities facing first-year principals in six U.S. districts. They found that more than a fifth of first-year principals left within two years of taking the role (Li, 2012, p. 1). First year departures were more likely when “test scores declined in their first year...” (Li, 2012, p. 1). Some countries and states report even greater numbers of early career departures. For example, the CPEF (2015) report was entitled: *Chicago’s Fight to Keep Top Principals*. According to the report, in a period of just three years “over half of Chicago principals quietly disappeared.” (CPEF, 2015, p. 6). While principal performance was found to peak around year five in the job, the report found that Chicago loses six out of every ten principals before that key milestone (CPEF, 2015). In her preface to the 2015 report, CPEF CEO Heather Anichini (CPEF, 2015) concluded “the systems that surround, support and retain principals are broken. That’s bad for our students, teachers and families”. Similar to other jurisdictions, even though principals have reported high levels of general satisfaction with their roles, they also reported that their jobs are simply not sustainable.

Early retirement. In *What’s Worth Fighting For in the Principalship* (2008), Fullan described the challenge of retention: “How are you going to keep them down on the farm once they have seen the farm?” In 2014, headlines based on an ASCL survey of 900 senior school leaders indicated that “more than two-thirds of secondary school head teachers and deputies in England were considering taking early retirement with most blaming an excessive workload” (BBC 2014, para. 1). In the report, the former director of ASCL, Brian Lightman, described how “heads face a ‘frenetic pace of change’” (BBC 2014, para. 3). These findings have been echoed in other jurisdictions, such as Germany (Weber, Welte, & Lederer, 2005).

Generational work patterns and pressures. Compounding teacher and leader recruitment issues are parallel retention issues. While the issue is not universal, many jurisdictions are experiencing upturns in teacher and leader departures from schools and education systems. In addition to work intensification, generational approaches to careers and work are also being touted as possible reasons for early career departures (Edge, 2016). As the new generations of Generation Y (born 1981-2003) teachers and Generation X (1966-1980) leaders enter school roles, their preferred ways of working, career aspirations and desires for mobility may also be influencing an increasingly rapid teacher and leader turnover (Edge, 2013). Generation X leaders often crave collaborative working, which is not always common in all school systems (Edge, 2013). CPEF (2015) is attempting to address this element of generational work preferences, and has established leader preparation measures to address the finding that six out of 10 Chicago principals leave the role before the end of their fifth year. In Chicago, growing and expanding leadership development efforts, including peer-to-peer learning are attempting to address generational preferences (CPEF 2015).

Regional variations in principal recruitment. Principal turnover is a significant problem and considerably more so when considering regional jurisdiction differences. Overwhelmingly, the principalship is perceived as being less desirable, which has an influence on leader recruitment and retention. Making matters more complicated, recruitment patterns are often not consistent across jurisdictions, with urban centres and rural regions experiencing the greatest challenges when attracting leaders (Pollock & Hauseman, 2016; Ryan et. al., 2009; Thompson, 2009).

EVIDENCE OF THE PROBLEM: WHAT DID WE LEARN FROM THE SYMPOSIUM?

An emerging body of evidence indicates that well-being and work–life balance for educators is a growing concern for school leadership associations (Catholic Education in Western Australia, 2015; Pollock, 2014; Riley 2013, 2014, 2015). The symposium strategically evaluated global trends for all generations, explored the meanings of work–life balance and well-being, and discussed the research evidence from several large-scale projects. Throughout the symposium, several important strands of thought and action emerged, which should underpin any forward-thinking strategies to address principal work–life balance and well-being.

Context. School leaders in the 21st century must continue to develop their “lead learnership” knowledge and skills. However, the reality is that administrative tasks often take precedence over instructional leadership functions. While symposium delegates represented different global, national and local experiences, a clear pattern of global principal work intensification was mirrored by all. Even within the escalation of volume and complexity of work, variability emerged in how the nature of principal workload influences their well-being. Any forward-thinking strategies to support PAs or principals examining and ameliorating their work lives and well-being need to reflect local context and traditions.

Pace of change. Two consistent themes challenging current and aspiring school leader well-being emerged: The first was the sheer pace of change in the nature of school leader work across the globe. The second theme related to how the last decade of global and local educational reforms have contributed to work intensification. Delegates agreed that these themes are having an influence on the principalship in their jurisdictions.

System design and educational incentives. Delegates reflected on the different system-level designs that strongly influence principals’ experience of their role. Clearly, system-level approaches to incenting and evaluating school improvement and leadership performance differ and have different effects on the work and lives of leaders. *Carrot and stick* approaches are individualistic and not consistently recognized as the best strategy for achieving system-wide student achievement impact and principal well-being. These individualistic approaches often have punitive accountability measures for principals who do not ensure gains. However, this educational model is still prevalent in many countries, and may, in fact, increase the odds of burnout and turnover. As Fullan (2014) has pointed out, countries that have established and supported a strong sense of the education profession did not do so by using the reward and punishment method, but rather by establishing a developmental approach. System-wide improvements call for focused, research-based approaches—ones that consider the student-centered leadership evidence and strategies for working with and for teachers, and use student data linked to the improvement of instruction. When considering how best to address principal work life and well-being, considering the influence of system-design on possible solutions will be integral to any successful intervention or advocacy campaign.

New leaders: New generation, new requirements. As the current wave of principals retiring crests in many countries, there will be greater numbers of newly hired school leaders. A review of Canadian literature published from 2000–2015 found a lack of effective principal succession planning can impact teacher morale, relationships with the school community and overall school culture (Pollock & Hauseman, 2016). The changing generational composition of school leaders, especially in systems with high levels of turnover, entails that newer cohorts of leaders often have less teaching experience and distinctly different professional development expectations (Edge, 2016). Training programs for new leaders often focus—as they should—on what is known to be excellent leadership practice, geared toward improving student learning. These programs also build on cutting edge pedagogical practice to ensure leaders develop robust and applicable knowledge and skills. However, programs may discount how different generations of leaders may be inclined to learn best, and need to work around different work and life requirements (Edge, 2015). Generational differences within schools related to work and lifestyle preferences will also have increasing implications for leaders, whole school collaboration and system coherence (Edge, 2015). Generational differences may also influence how leaders deal with their own work intensification and choose to manage their own work lives and well-being, either within or beyond the education system (Edge, Galdames & Horton, 2017). Similarly, Edge, Descours, and Frayman (2016) found that newer generations of leaders do not feel they have good role models for work–life balance. Given the “important role that their school leaders play in supporting and modeling a healthy balance for staff” (Edge, Descours & Frayman, 2016 p. 16), there is pressure to ensure all school leaders can find ways to create and maintain healthy work and home lives.

Increasingly important role of school leader associations. School leader association delegates actively wrestle with how best to understand, support and advocate for principals when addressing current and future work intensification, and the influence this intensification has on their work–life balance and overall well-being. While organizations are working to address the issues, many expressed frustration with the level of activity required to fully understand and create innovative advocacy programs for leaders and policy makers alike.

SECTION 2

THE CHANGING NATURE OF SCHOOL LEADERS' PRACTICE

Symposium participants provided context, evidence and information associated with work-life balance and well-being issues for school leaders. The pace of change, system-design, changing expectations from different generational learners and the increasingly significant role that school leader associations play, demonstrate the influence of global educational reform. These educational trends influence the work of school leader's practice. Next, we explore in more detail how these global educational trends influence the work of school leaders.

EDUCATION TRENDS

Few educational jurisdictions have been spared from the dominant patterns in global education reform over the last decade. Those that have had the greatest influence on the working lives of principals may be linked to the rapidity and multiplicity of policy enactment, operational and building management demands, advances in Information and Communication Technology (ICT) and changes in student demographics and needs.

Rapidity and multiplicity of policy enactment. Over the last decade, the pace and scale of educational change in many jurisdictions has been relentless; these changes have been characterized by a rapid flow of initiatives designed to improve leadership, teaching and learning, and student outcomes. Fullan (2008) reflected on the term initiatives to capture the effect of working in this context, symbolized by a suite of symptoms including loss of focus, overwork, frustration and demotivation. More specifically, the state of affairs has been described as “the tendency to launch an endless stream of disconnected innovations that no one could possibly manage” (Fullan, 2008, p. 1). Too many initiatives and policy implementation requirements quickly result in working conditions wherein the pace of change prevents leaders and teachers from becoming fully aware and committed to an idea before a new one replaces it. Individuals working in these conditions may have difficulty sustaining focus and energy.

Participants attending the international symposium agreed that there have been positive influences from some global policy patterns designed to improve information technology, equity and Indigenous initiatives. However, research indicates that school leaders' job satisfaction declines when there is constant pressure to adopt new programs. In the Ontario context, Leithwood and Azah (2014b) have suggested that “excessive numbers of initiatives from the Ministry of Education, initiatives lacking connection to one another, switching from one initiative to the next rapidly, [leads to] frustration with lack of clear direction on roll out” (p. 18). In an address to Irish Primary Principals' Network, the CEO of the organization, Seán Cottrell shared that “the initiative fatigue that is draining morale from teachers and principals is the biggest threat to educational quality” (quoted in Evans, 2016, para. 8). Competing accountability systems for different initiatives place additional stress on principals. This lack of alignment between reforms can lead to constant change, which diverts attention toward administrative work rather than leading learning for student achievement (p. 2). Workplace stress can create physical and emotional responses when principals experience conflict between the demands of their roles and their ability to exert control to resolve them.

In some jurisdictions, centralized education authorities have rolled out multiple education initiatives that have increased principal responsibilities and expectations. At the same time, however, principals have perceived a decrease in principal autonomy. For example, a new Ontario regulation limits principals' authority to hire teachers, even though the principal is the lead learner responsible for creating conditions that promote student centered leadership (Edge, 2016). As a result, principals are unable to hire the teachers they believe are the best fit for their school. While this may contradict research about student-centered leadership effectiveness and the role of principals, Edge (2016) has suggested that more centralized, district-level hiring of teachers may potentially promote greater commitment to the profession, as opposed to decentralized systems where teachers' primary commitments may be to a single school.

Operational & Building Management Demands. One of the unintended consequences of multiple initiatives and increased school accountability is increased operational and building management demands. In general, we know these operational management tasks vary widely, including: coordinating school activities, filling in for before/after and lunch time yard duty, managing financial resources to develop maintenance schedules for maintaining

the school building, intervening to follow up and work with repairs and maintenance to school buildings and so forth. In Ontario, Leithwood and Azah (2014a) have argued that these demands consume approximately 90% of most principals' and vice-principals' time (p. 3). We also know that most principals want to spend less time on management-related activities and more time on being a lead-learner. The unresolved tension between the procedural components of principals' work and the instructional components of being a leader also has consequences. Fullan (2014) has claimed that "75 percent of principals feel that their job has become too complex, half of all principals feel under great stress 'several days a week' ..." (p. 5). We also know that principals from Ontario who experience emotionally draining situations are more likely to indicate that, if they were to do things over, they would have remained a teacher or worked in an industry/sector other than education (Pollock, Wang, & Hauseman, 2016).

Advances in Information Communication Technology (ICT). We consider ICT to broadly include storage, manipulation and communication of knowledge and information via the internet, mediated by smart phone, tablet and/or computers. We consider ICT-mediated work as intending to influence social, economic and/or political process. The evolution of ICT has influenced education in several key ways. First, ICT affects how teachers teach and students learn with assistive technologies and increased access to information (Dibbon & Pollock, 2007; Pollock, 2008). Second, ICT has allowed for alternative ways to structure schooling, which require other ways for principals to lead, such as e-leadership (Gurr, 2004, 2000). Third, ICT has also changed the nature of principals' work in traditional face-to-face schooling, as alternative modes of communicating such as email, texting and Twitter further complicate communication with teachers, students and parents.

For principal well-being, there seems to be both an upside and downside to using ICT, particularly email. For example, some school leaders appreciate the "accountability trail" that email provides (Pollock & Hauseman, 2016, p. 2). Unfortunately, the nature of 24/7 communication access has come at a price. Pollock, Wang and Hauseman (2015) have argued that principals experience a high volume of emails, increased organizational expectations with shorter response time and a blurring of boundaries between work and home—the pressure to be constantly "on" (p. 2, 17, 18). The total volume of email generated has rapidly and consistently increased over time; principals are now being bombarded with more information than they can reasonably process. These overflowing and continually growing inboxes, which require responses and actions, contribute to work overload. What may have once been trivial has become a dilemma that forces principals to increase their work hours. Another unintended consequence of ICT advancements is the increase of cyberbullying, which has emerged as an issue for principals in their work (Pollock, Wang & Hauseman, 2015).

Cyberbullying & Technology Leadership. As noted above, principals' work lives have become more complex as they have to deal with cyberbullying within or beyond school. Given that school leaders are responsible for creating healthy school cultures and conditions, cyberbullying ranks high among principal concerns for student mental health and well-being. For example, respondents to Pollock's (2014) large-scale survey of Ontario principals identified the jurisdictional *Safe Schools Act*, which includes provisions against cyberbullying, as the third most influential policy in their daily work. Further, in another study, Pollock (2015) found that principals in Ontario feel cyberbullying can, "hinder student learning and interfere with the promotion and maintenance of a healthy school climate" (p. 31). Carroll (2010), in a blog entitled *Cyberbullying: Should the Buck Stop at School? An Administrator's Point of View*, shared how "the increased incidence of cyberbullying is creating a quandary for school administrators because policies and laws are murky with regard to investigating and disciplining the bully" (para. 6). Regardless of jurisdictional awareness of and legal infrastructure related to cyberbullying, "school administrators... are inundated with incidents of student conflict and unrest as a result of text messaging and social media" (Carroll, 2010, para. 6).

Although limited research is available, cyberbullying appears to affect principals by consuming a large portion of their time, and drawing their energy and focus away from teaching and learning. In *The Future of the Principals in Canada* The Canadian Association of Principals (CAP) and the Alberta Teachers' Association (ATA) (2014) found that "discipline problems and dispute resolutions related to inappropriate use of social media consume enormous amounts of principals' time and energy" (p. 13). In particular, leaders experience "workload increase, cyberbullying and digital divides as issues related to technology" (CAP & ATA, 2014, p. 11). Principal participants in this study from across Canada:

Also expressed concerns about fallout from pernicious and frequent use of social media among students, and, in some cases, parents. Cyberbullying and community gossip are damaging school climates and many administrators are struggling to respond effectively. (CAP & ATA, 2014 p. 11)

Growing student population diversity. Diversity is associated with gender, race, ethnicity, religion, culture, socioeconomic status, academic abilities and sexual orientation (Ryan, 2006; Briscoe & Pollock, 2017). Increasing diversification of student populations refers to the heterogeneity of student bodies in schools or school systems and how, with more sophisticated evidence to guide awareness of student needs, leaders are expected to and want to create differentiated conditions for learning. What this means is that different student populations may have always existed within schools, but their specific needs were not recognized or respected. For example, some groups of students with learning approaches different from traditional teaching and learning styles often went unrecognized. Changes within student populations also reflect greater demographic shifts in the wider population.

Diversity of Student Needs. Importantly, diversity may also describe the diversity of student need-related variations including “medical conditions, learning disabilities, language learning needs, mental health issues, cultural differences, and basic needs” (CAP & ATA 2014, p. 10). The Alberta Teachers’ Association (ATA) and the CAP conducted a national study (2014) of 500 principals exploring the trends shaping the work of Canadian leaders and their future aspirations. Principals’ top three concerns were school role overload, social media-related policy problems and meeting diverse student needs (ATA, 2014). The study also captured current resource challenges that principals face when attempting to meet the needs of their increasingly diverse student populations. These pressures create direct and indirect influences on principal workload and school capacity:

Across the country, administrators reported that it is often impossible to meet the range of student needs with present resources. For instance, principals often stated that they and their staff lack the specialized training required to teach English as an additional language and to bring cultural understanding to their practices. While school leaders aspire to see diversity as an asset, they struggle to reconcile the growing complexity of student populations with the declining resources. (CAP & ATA, 2014, p. 10)

Participating principals shared that their work conditions were often stressful and that “principals and teaching staff are overwhelmed by the range and number of needs presented by students and their families” (CAP & ATA, 2014, p. 11). Increasingly, across many jurisdictions, student mental health continues to be an escalating concern with direct repercussions for principal work overload and well-being. Principals have few onsite resources and no psychiatric training with which to support students and adults with severe mental health issues (Pollock, Wang, & Hauseman, 2015). These pressures detract from principals’ roles as instructional leaders, as they are tending too frequently to health and safety requirements (Pollock, Wang, & Hauseman, 2015).

The lack of school-based special education expertise results in principals having little if any resources and support for special educational needs (Pollock, Wang, & Hauseman, 2015). In a 2014 ATA Magazine article, *The Changing Role of the Principal*, superintendent Yanitski and principal Kierstead discuss how the principal role has changed:

The role schools play in communities has changed in such a way that there is an acknowledgement that schools can no longer meet all the expectations in isolation. Principals are looking outside the school to form working relationships and partnerships with others who assist in child development... Principals are engaging with service agencies, business, government agencies... (Kierstead quoted in Yanitski, 2014, para. 3)

In the *Future of the Principalship in Canada* study (CAP & ATA, 2014), principals called for more specialists in schools. This dovetails with findings from Leithwood & Azah (2014a) in which trustees pointed to the challenges of principals’ work as related to “time dealing with special education issues” (p. 66). These issues are compounded by “the time-consuming nature of administering occupational health and safety regulations, especially the time involved in follow up reports,” the “heavy documentation involved in violence in the workplace, and all forms associated with health and safety and lock-down policies,” and regulations related to staffing procedures designed for compliance but which create additional work when the wrong person is hired (Laithwood & Azah, 2014a, p. 22).

SECTION 3: SOLUTIONS FOR SCHOOL LEADER ASSOCIATION STRATEGIES FOR SUPPORTING PRINCIPAL WELL-BEING AND WORK-LIFE BALANCE

UNDERSTANDING GLOBAL APPROACHES TO SUPPORTING LEADERS: EXAMPLES FROM PARTICIPATING SCHOOL LEADER ASSOCIATIONS

Globally, school leader associations are developing strategies to support their members' well-being and advocate for better approaches to work–life balance. These support strategies range from sharing research and information on secure member websites to curated professional learning opportunities. Associations also offer mentoring and coaching support, self-assessment tools and confidential phone lines. Associations are increasingly developing, or commissioning the gathering of, robust bodies of research evidence about their members' well-being and work–life balance to enrich support and advocacy, practice and decision-making. Some resources are more interactive than others, and most appear to be proactive measures. These strategies are also not necessarily discrete activities but are combined with a suite of strategies under an association's well-being and work–life balance initiative. Based on discussions at the 2016 International Symposium, the following strategies have been implemented around the world.

Information Sharing for Members. Several school leadership associations post information and advice for their members about well-being through member access-only websites. For example, in the UK, the National Association of Head Teachers (NAHT) website offers member advice and answers to frequently asked questions about a number of topics, including working with parents and pupils, principal working conditions and pay and equity issues.

Continued Professional Learning. There is great diversity in the content and delivery of SLA-curated continued professional learning. Associations are adopting a wide range of formats for professional learning delivery, including social media-based, online, face-to-face, or a combination of these. For example, the IPPN offers professional online learning courses for newly appointed principals; The European School Heads Association (ESHA) participates in workshops organized by the Joint Action for Mental Health and Well-being to address school-based mental health focused on students and youth; and the Ontario Principals' Council (OPC) supports members by delivering professional learning through several mediums, including combined face-to-face and online modes. The online component also embraces social media platforms, such as Twitter. Several associations are using Twitter chats focused on key topics from the course content. The duration of learning opportunities varies from one-day workshops, to week-long events, to continuous learning over a two-year period. Professional learning opportunities that are supported by school leadership associations appear to exhibit different content focuses, including developing leadership skills and knowledge to promote principal success, with the indirect effect of improving principals' work–life balance and well-being. For example, the Association of Washington School Principals (AWSP) programs, such as those supporting aspiring principals, are presently designed to address the recruitment and retention issues experienced within its jurisdiction. Whereas, Catholic Education in Western Australia (CEWA) has established an intensive eight-day program specifically focused on experienced principals' physical and mental health and well-being.

Coaching. While coaching can be considered a form of professional learning, we categorize coaching separately because of its use by professional school leader associations. Professional school leader associations use coaching for several reasons: to encourage a particular culture and climate shift in schooling, as a strategy for recruitment and retention and to improve personal health and well-being. The Western Australia Primary Principals' Association (WAPPA) utilizes coaching principles and skills to lead a coaching culture, with the goal to create and support more cohesive partnerships with community role-models and health services to improve student learning outcomes and well-being. The Association of School and College Leaders (ASCL) utilizes coaching as part of their recruitment strategy. The ASCL partnered with other organizations to create the Leading Women's Alliance, which

includes a coaching component to encourage and support more women into senior leadership roles. Other individual coaching programs specifically target individuals and their health and well-being. For instance, CEWA provides an executive health assessment initiative that includes health coaching to target and improve health and well-being.

Mentoring. Mentoring and coaching are closely related practices, but symposium participants isolated these forms of principal support. For example, the Catholic Secondary Principal's Australia (CSPA) and the British Columbia's Principal and Vice-Principals Association (BCPVPA) engage new principals in mentoring opportunities. In British Columbia, the provincial leadership standards were developed to provide a framework for new and aspiring principals to engage in mentoring, coaching and peer supports.

Health-Assessment Tools. Assessment tools are nothing new in education, but the established demand for well-being assessment tools in education for students is expanding as demand rises for teacher and leader well-being resources. However, few teacher and leader assessment tools currently exist. The CEWA provides a leading-edge example in their executive health assessment tool focusing on school leaders. The CEWA assessment can include blood pathology, a health and well-being survey, physical assessment and medical examination.

Support Phone Line. While some school leadership association strategies are preventative in nature, the nature of principals' work at times requires "just-in-time" supports. The WAPPA provides a support phone line that is available to all members; the support line offers confidential support and guidance from experienced principals. Most of the calls received focus on school management, human resource issues, safety and welfare.

Utilizing bodies of research to inform practice and decision-making. Generally, applied education research has focused on the technical aspects of principals' work, such as administration, management and leadership. Less research emphasis has been placed on principal's' work-life balance and well-being. Recently, school leadership associations began to commission and/or endorse research that specifically focuses on principal well-being. For example, the Australia Primary Principals' Association (APPA) is engaged in a research initiative entitled, *Principal Health and Well-being Project*. This project explores the role of employers, system leaders and government-level departments in supporting quality leadership and high performing principals in every school in Australia. The CEWA also published a *Principal Health and Well-being* study that examines principals' role perceptions, role stress, sleep habits, physical health, work practices and exercise, as well as the impact of the role on principals' families and colleagues. Other Australian professional school leader associations, such as the Australian Government Primary Principals' Association (AGPPA) are using findings from the *Australian Principal Occupational Health, Safety, and Well-being* survey (Riley, 2015, 2014, 2013). In Canada, the ATA, in partnership with the CAP, conducted a pan-Canadian study focused on principals' workload (CAP & ATA, 2014). Provincially, the OPC has commissioned and supported a number of studies on principals' and vice-principals' work and well-being (Pollock, 2014, 2017). These studies have informed existing professional learning initiatives, generated additional professional learning opportunities and advocated for principal supports at the school district and provincial government level.

SECTION 4: RECOMMENDATIONS FOR SCHOOL LEADER ASSOCIATIONS

Not all professional school leader associations are organized in the same way. Some have slightly different mandates, membership structures, authority and funding structures. All have different degrees of accountability with numerous public education stakeholders. Overall, however, they have the same aims and advocacy goals. Our recommendations fall into four advocacy areas: jurisdictional policy advocacy, redefining the role, advocacy for school- and system-level support and delivery of school leader support and development opportunities.

SCHOOL LEADER ASSOCIATIONS AS JURISDICTIONAL POLICY ADVOCATES

1. **Clarify Intent.** We recommend that professional school leader associations interpret and clarify ambiguous language in collective agreements, the changing educational agenda and support member communications (e.g., related to clarifying role of principal, priorities, mixed messages from national initiatives).
2. **Association Awareness Campaign.** The work of teachers is more transparent to the public than that of school leaders because teachers are in more frequent contact with students. The work of school leaders is less visible. We recommend that professional school leader associations build awareness and provide clarity to policy makers and stakeholders about the actual influence of school leader associations and their work on behalf of school leaders.
3. **Awareness Campaign for School Leaders.** Most educated individuals know more about teachers' work than they do about principals' work, largely because all individuals who have attended formative education have spent considerably more time with teachers than principals, and there are considerably more teachers than principals in public education. We recommend that professional school leader associations promote appreciation and recognition of the influence of school leaders on student learning to both policy makers and the public.
4. **Promote Collaborative Working Relationship with Policy Makers.** Some professional school leader associations are official, legal representatives when negotiating for labour issues, while others engage in an advisory role. Regardless of the official status, all associations aim to secure better working conditions for school leaders. In considering the role of professional associations in addressing principals' well-being and work-life balance, many symposium participants provided examples of how they would like to see their policy-making body interact with them.
 - Seek advice and input at early stages of policy development related to the impact of initiatives on school leaders, and collaborate with professional associations to clarify the specific role of school leaders in implementation; for example, time allocation related to overall focus and priorities related to instructional leadership (and assessing "fit" within shared understandings related to documents such as a school leadership framework).
 - Limit initiatives to three goals that are more specific (and not so broad as to be an "umbrella" for advocating almost any reasonable initiative) and limit the number of initiatives so that schools can actually implement them.
 - Plan government initiatives in predictable transparent cycles in longer range forecasting. This will reduce reactive measures and the constant bombardment of principals, which may not be in the best interests of impactful implementation timelines and sustained focus for increasing success for all students. (Leithwood & Azah 2014b, p. 92). This could also address increasing turnaround time for Ministry initiatives and for meeting the reporting requirements associated with them.
 - Work with school leader associations to plan and provide adequate training provision for implementing external initiatives.
 - Reduce time-consuming nature of regulations, follow-up reports and documentation (e.g., related to violence in the workplace not aligned with school sites, compliance related to hiring decisions, progressive discipline and bullying investigations, occupational health and safety regulations).

- Move away from a “one size fits all” mentality toward differentiating school needs for principals, so they will be able to use professional judgment when translating and implementing initiatives into decisions that best fit the needs of their specific school and student needs.
- For any new provincial (or state or national) initiative, integrate routine analysis and input from school leader associations related to
 - number of initiatives already underway in schools,
 - degree to which existing initiatives are being implemented in the school,
 - the match between newly provided initiatives and the school’s improvement goals and priorities (with regional considerations, schools at different places and different needs) and
 - envisioning time requirements for principals to implement, manage and ensure new initiatives will be sustained (and big picture impact of overall consequences on principal workload and student leadership focus).

5. **Promote Collaborative Working Relationship with Teacher Unions.** These actions are presented in the context of working with teacher unions to find solutions toward making principal (and teacher) work time more manageable in the service of learning for students.

- **Review Regulations.** Part of the expectation as an instructional leader is to support teachers in their own professional learning. However, some regulations in several jurisdictions limit principals’ abilities to work with teachers to increase teacher and student success. We recommend that professional school leader associations work with teachers’ unions to review regulations that restrict principals from providing individualized support and professional learning for teachers.
- **Modifications to Hiring Practices.** Teacher associations and school leader associations both work toward student success; one way to work toward this goal is by effectively hiring teachers that are the most qualified and suitable for local contexts. We recommend that professional school leader associations work with teacher unions to collaboratively agree upon hiring practices that support principal professionalism in hiring the most qualified teachers for student success in their schools.
- **Redistribution of Time.** Because of the nature of schooling, students are to be under the care and supervision of an employed adult at all times. This level of supervision means that, when students attend school, there must always be an employed professional present. The allocation of this supervision is usually dispersed among teachers and school leaders. However, the allocation of time and the use of principals’ time is better used in some school sites than in others. We recommend that professional school leader associations work with teachers’ unions to assess options to reduce the significant time that principals may spend on school/lunch and yard duty, and school safety regulations.
- **Develop generationally appropriate strategies.** Collaborate to support growth strategies for Generation X and Y with defined pathways and options for development opportunities that also enable scaffolding succession planning.

SCHOOL LEADER ASSOCIATIONS AS ADVOCATES FOR REDEFINING SCHOOL LEADERS ROLES

Continued Focus on Instructional Leadership. While teachers are tasked with the teaching and learning associated with students’ education, this task should also be the focus of school leaders. We recommend that all professional school leader associations align new policy initiatives with priorities that reflect an instructional leadership focus (e.g. hiring practices and student achievement initiatives).

Role Clarification with New Initiatives. Emerging research points to school leaders engaging in additional roles at their work. We recommend that all professional school leader associations clarify with policy makers how the role of the principal is related to any new initiatives—for example, mental health, cyberbullying, technology leadership and so forth.

Review Management Related Activities. Association representatives reported that many of their members wished to spend less time on managerial and procedural tasks. We recommend that all professional school leader associations, where possible, reassess management-related activities to consider how to reduce job-devoted time—for example, delegating, reducing and eliminating increasing workload manageability, as well as positioning school leaders for success by focusing on their priorities as lead learners.

Realistic Expectations around ICT Use. The use of ICT as a tool to lead and manage schools will only grow in the future. We recommend that all professional school leader associations work with education stakeholders to shape shared policy around expectations for work-related use of ICT, such as sending and responding to emails. (Pollock, 2016, p. 14).

SCHOOL LEADER ASSOCIATIONS AS ADVOCATES FOR SCHOOL AND SYSTEM-LEVEL SUPPORT

Lobby for a Dedicated Building Management Position. Participants at the symposium suggested that a role realignment was due. We recommend that all professional school leader associations lobby policy makers to consider creating a school position entirely focused on building management. This would reduce principals' responsibility and activities, allowing them to dedicate more time and energy to the leadership aspects more closely aligned with achieving student success.

Negotiate Benefits. The benefits that school leaders have through their employment arrangement varies by location: Principals school leaders in some jurisdictions have significant health benefits while those in other jurisdictions receive none. We recommend that all professional school leader associations negotiate appropriate benefits with employers that support principal health and well-being (e.g., counselling, physiotherapy, etc.).

Appropriate Resource Allocation. Public education systems are always held fiscally accountable, and the majority operate on limited resources. Some school leaders find themselves working in public systems with healthy budgets that inequitably distribute resources, while others work within education systems that are financially overstretched. We recommend that all professional school leader associations advocate for adequate school resourcing, specific to specialized expertise in the service of student learning (e.g., special education, English language learning and mental health).

Streamline Work Processes. All new initiatives require some degree of implementation process. We recommend that all professional school leader associations assess all time reductions possible for streamlining work processes such as limiting travel time for principals and reducing tasks (Leithwood and Azah, 2014a).

Reduce Paperwork. One unintended consequence of increased accountability is more amplified recording and monitoring processes for principals. We recommend that district school boards work with professional school leader associations to reduce document requirements such as volume of reports, memos and emails.

Limit Out of School Meetings. Leading public schools is a complex endeavour. Emerging research indicates that with each new initiative, principals attend multiple meetings outside the school. We recommend that district school boards work with professional school leader associations to reduce the number of meetings principals must attend, so they can spend more time in classrooms (Leithwood & Azah 2014a).

SCHOOL LEADER ASSOCIATIONS AS KEY ORCHESTRATORS OF SUPPORT AND DEVELOPMENT OPPORTUNITIES

In addition to advocating for their members, professional school leader associations also provide support to their colleagues. This support can be categorized in two ways: organizational support and professional learning opportunities. These two types of support can set school leaders up for success.

ORGANIZATIONAL SUPPORTS

Organizational supports include those structures and procedures that school leader associations control. Internal information campaigns, support documents, policy development, website content and support phone lines are discussed in more detail below.

Awareness Campaign for Association Members. Recent studies confirm what some principals have been reporting over the past few years that their position can be isolating. There may be supports provided by professional school leader associations of which their full membership may be unaware. We recommend that all professional school leader associations engage in an awareness campaign of the various supports available within their association for principals to seek professional advice.

Streamline Processes. Some of the procedural work that principals must complete according to numerous policies appears to take up a substantial amount of time. We recommend that all professional school leader associations consolidate standardized templates, sample letters and routine tasks into an operational manual for school office staff, which would save time and alleviate principal workload.

Facilitate School Level Policy Development. Principals experience various degrees of authority when developing school policy, depending on their jurisdiction. Regardless, all principals still engage in some sort of local school policy development. We recommend that all professional school leader associations support principals with school-level policy development—for example, defining school policy for effective use of ICT (e.g., email).

More Effective Use of Websites. Because of the nature of school leaders' work, necessary information must be easy to access, presented in clear language and provide specific direction or action. Not all association websites allow easy and timely access, nor is the information clearly presented. Pragmatic, free and open-access strategies for dealing with stress could be posted for members, and information about support services for principals in crisis (such as a support line) could be accessible on associations' websites. The information could be anything from summaries of policy directives to practices supported by well-developed bodies of knowledge and/or evidence. We recommend professional school leader associations re-evaluate association websites to determine how best to use this tool to support school leaders more effectively.

Support Phone Lines. A few of the participating professional associations described the use of support phone-in lines, where principals can call if they are in crisis. According to representatives at the symposium, these were well-received and provided one way to collect information about school leaders in the field. Over time, they indicated they could track trends and respond accordingly. We recommend professional school leader associations consider investigating how this technology could support their school leaders.

PROFESSIONAL LEARNING OPPORTUNITIES

In terms of professional support, professional school leader associations predominantly concentrate on providing members with necessary skills and knowledge for their work, and various alternative mediums and structures for delivering that content. The recommendations for this section include four content focus areas and alternative ways that members can access this content. The four content focus areas included: traditional leadership skills, individually driven interests, topics for mid-career school leaders and specifically well-being and work-life balance. Some of the alternative approaches include individually-paced learning, online learning, using social media and mentoring and coaching.

Continued Professional Learning as the Lead Learner. The most prominent approach to coping with issues around work-life balance and well-being focuses on providing professional learning that concentrates on improving efficiencies of school leaders as they fulfil their role. For example, this would include concentrating on effective instructional leadership and school operations.

Diverse Options for Professional Learning Content. A focus of professional school leader associations is supporting leaders to execute their job well. This often translates into concentrating on elements of leadership and

administration, with the overall aim of student success. In addition to continuing this role, we recommend professional school leader associations offer options for additional qualifications and continuous learning in areas some principals may feel uncertain about such as finance, and mental health issues for both students and teachers.

Professional Learning for Mid-Career School Leaders. As demonstrated at the beginning of this White Paper, we are quite confident that the work of school leaders will continue to respond to both local and global changes. For this reason, we recommend that professional school leader associations create targeted development for mid-career school leaders, which would reflect a continuing growth mindset and help contribute to a high level of job satisfaction.

Professional Learning that Focuses on Well-being and Work-life Balance. Specific professional learning that includes all aspects of well-being and work-life balance is central to the issues school leadership associations are dealing with. This professional learning should particularly focus on the various strategies to cope with the changing nature of school leaders' work, such as making time to eat meals, increased sleep hours and so forth. We recommend professional school leader associations concentrate on the latter approach to help school leaders cope. Specifically, we recommend school leaders consider healthy coping options and services that are accessible in local contexts.

Individualized, Self-paced Learning Opportunities. Even though adult learning models emphasize collaborative learning from professional colleagues, some principals' reality does not allow them the opportunity to continue learning in a cohort or group. We recommend that professional school leader associations provide online learning opportunities and flexible access to professional learning so that principals can participate at their own pace and at a time that works for their schedules.

Professional Learning Opportunities to Current Principal Workload. Not wanting to add additional work to principals' already busy workload, and understanding that professional learning does require time for meaningful engagement and reflection, we recommend that professional school leader associations consider differentiated professional learning. Specifically, differentiate school leadership professional learning to the nature and amount of work anticipated by school assignments to support principals managing their workload.

Online Learning Options. Embracing advances in technology has allowed many organizations to engage with their members virtually. This engagement includes entire online programs, hybrid courses, short courses through webinars, synchronous and asynchronous approaches, Twitter chats and more. We recommend professional school leader associations continue to extend professional learning access through online options and to consider brokering the use of programs and training that already exist, rather than allocating limited resources to creating similar professional learning.

Leverage Social Media. The use of ICT and social media to lead and manage schools has increased substantially over the past decade. School leaders are now expected to communicate with stakeholders through several different mediums. We recommend professional school leader associations leverage the power of various forms of ICT and social media to support school leaders. Working with leaders to demonstrate and leverage efficient use of social media related to school communications may be beneficial for leaders. Facilitating social media-driven strategies to enhance professional learning communities (PLCs) may also be beneficial.

Mentorship Programs. Professional associations are unique in that their members include expert practitioners whose tacit knowledge and skills can be used for effective mentoring programs; professional school leader associations also possess expert practitioners. We recommend that professional school leader associations provide mentorship opportunities between less experienced principals and more experienced principals, tied to an assessment of workload and management that maximizes support for both experienced and novice principals.

Coaching. Many attending association members described how their association provided different sorts of useful services and supports connected to coaching. Some associations provided professional learning where school leaders learned coaching skills. In some cases, the goal was to create a coaching school culture, while in others coaching was used to respond to stress and burnout.

SCHOOL LEADER ASSOCIATIONS SPEARHEADING OR COLLABORATING ON WORKLOAD AND WELL-BEING DATA GATHERING

- Advocate for more research connections between principal health and well-being, and the increasing volume and complexities of instructional leadership; drive continued focus and links to what professional school leader associations can do to support principal well-being.
- Carefully examine the origins, causes and effects of email overload, specific to the daily life and realities of principals; assess the potential to overcome it; and provide a more comprehensive understanding of solutions. Consider the characteristics of emails, and why they have become so difficult for principals to manage.
- Research time use, job satisfaction and perceptions related to whole school engagement; conduct further research into Generation X and Y work preferences to consider implications for principal well-being, school-based work conditions, communications, recruitment and retention and professional learning.

CONCLUSION

This White Paper has outlined an emerging consensus amongst researchers and professional school leader associations of a growing global crisis in school leader well-being. This crisis is defined by a simultaneous increase in volume and complexity of work, and the resulting loss of a sustainable and healthy work-life balance. Although the shape and nature of this crisis is defined by local and national context, global patterns emerge related to demographic changes in the student body, growing recognition of the diversity of student needs, rapid changes in the nature and accessibility of ICT, and the pace and scale of education reforms in the 21st century. We believe without urgent policy and practice intervention, the current state of principal work and well-being will impact system- and school-level outcomes for generations to come.

It is important to remember that even in the face of mounting challenges, school leader remain both resilient and committed to their schools and communities. As Pollock (2014) reports, 81% of Ontario principals feel their roles remain rewarding and 91% of principals believe their school is a good place to work. The same study found that 91.8% of principals believe “their job makes a meaningful difference in the school community” (Pollock, 2014, p.27). This conviction and commitment in the face of mounting challenges is encouraging, as school leaders play a unique and critical role in the success, well-being and continued improvement of their staff, their students and their entire school communities by acting as lead learners, and creating the conditions for quality teaching and learning (Leithwood, Pink & Pollock, 2017; Robinson, 2011). More research must be done to fully understand the relationship between school leader well-being and school, staff and student outcomes.

Professional school leader associations have an important role to play in addressing school leader well-being and work-life balance, acting as knowledge brokers, advocates and policy activists for the well-being of their constituents. Globally, SLAs are developing strategies to support their members’ well-being and advocate for better approaches to work-life balance. Building on the current best practices and experience of symposium participants, this White Paper makes several recommendations for areas of advocacy and operational support that address the unintended consequences arising from the pace and scale of education reform, the growing centrality of ICT, and the changing nature of the principals’ role. These recommendations fall into four key categories:

- Jurisdictional policy advocacy
- Redefining the principals role
- Advocacy for school- and system-level support and
- Delivery of support and development opportunities.

While the applicability of specific recommendations depends on local and national context, SLA jurisdiction, mandate and membership structure, the recommendations in this White Paper offer both a foundation and a vision for schools and systems across the globe facing the mounting pressures of educational reform, demographic shifts and technological change. Importantly, while SLAs can and must act as advocates for policy change, work to share resources, and offer continued professional learning and support for their members, the challenge of addressing principal well-being and work-life balance extends beyond principals and their professional associations: it rests in the hands of policy makers and school systems.

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