

The Emperor's New Clothes?! Understanding the experience of educators in their transition to school management roles in the secondary school system in Jamaica.

Deana- Kay Stewart- McIntosh

**A thesis presented in fulfilment of the requirements of Edinburgh Napier University,
for the award of Doctor of Business Administration.**

March 2022

Abstract

A report by the National Education Inspectorate (2015) claimed that as many as 20% of the 28 schools graded leadership and management as unsatisfactory (Hibbert, 2020). This research seeks to explore the experiences of educators in the Jamaican secondary school system as they make the transition to school management roles. This is to identify and examine the challenges experienced in school management.

This research provides detailed account of the experiences and perceptions of a purposive sample of 12 school leaders including senior teachers, grade coordinators/ supervisors and principals who have experience of that position for at least 10 years. The research followed a qualitative approach rooted in an interpretivist perspective and drew from a phenomenological design. The experiences were collected by semi-structured interviews and analysed using Interpretivists Phenomenological Analysis (IPA).

Four research questions were used to guide the research process in which the research findings indicate that the transitional process is challenging and impacts performance within the first year. The process was described as a learning process and often overwhelming. The key themes identified were unpreparedness for the role, lack of a standardised process for selection, learning on the job, active resistance, and seniority. The challenges encountered were internal and external, however, those transitioning used strategies to adjust within the first year such as reading, past experiences or mentors.

The key findings were used to develop a conceptual model to assist educators in transitioning into school management. The model provides guidelines aimed at improving the transitional process. The research delivers an understanding and awareness of the impact of the transitional process on performance in school management, thereby providing recommendations to improve practice and alter perceptions/ behaviour during the transition. Finally, the research contributes and provides insight into the learning experiences aimed at improving quality and performance in this setting.

Acknowledgements

I am Thankful to God Almighty and praise His glorious name. For His Strength and Guidance throughout this doctoral journey.

I am incredibly grateful to all the individuals who assisted in the completion of this thesis. I am unable to include all the names however, your contribution has not gone unnoticed, and I am forever grateful. I am grateful for the words of encouragement, understanding, calls, prayers, and patience. Please be assured I was very humbled by your support and remain eternally thankful.

To my Supervisors, Dr Gerri Matthews Smith, Dr Gary Kerr and Dr Patrick Harte, your guidance and experience ‘through the walk-in park’ made this journey possible. Dr Gerri Matthews Smith, I cannot truly express how appreciative and grateful I am to you. Thank you, for your patience, continual encouragement, enthusiasm, and support.

This journey would not have been possible without the support and sacrifices of my husband, Marlon McIntosh. This goes beyond the tremendous financial sacrifices but overwhelming love, prayers, and support throughout this process. You were my constant cheerleader at each level and pitfalls. Thank you, my love.

Declaration

I declare that this Doctor of Business Administration thesis is my own work and that all critical and other sources (literary and electronic) have been properly acknowledged, as and when they occur in the body of the text.

Signed: *D. Stewart- McIntosh*

Deana- Kay Stewart-McIntosh, March 01, 2022

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1. Introduction

This chapter provides an introduction and overview of the rationale for the research and introduces the researcher. A brief profile of the research, the purpose and importance of pursuing the research problem begins the chapter. An explanation is offered as to why this research topic might be beneficial or of interest to the educational sector, along with a short background of the Jamaican education sector to provide context for the research. The background and the context provide clear parameters of the position of the research. The chapter ends with a summary of the content of each chapter that provides an overview of the structure to help guide readers.

1.1 Researcher Profile

I have worked for fourteen years as a teacher and lecturer at various levels within the education sector. The Jamaican label would be ‘Teacha’ as a symbol or sign of respect when referred to as a teacher. An Educator is not simply an instructor or a facilitator of learning academically. However, I believe, based on my experiences, an educator is a life coach who imparts life lessons and gives guidance for the emotional, mental, and economic issues that affect the students.

I have worked at both the secondary and tertiary levels of the education system in Jamaica. My permanent employment was at the secondary level, and I worked part-time at vocational and training programmes and a prominent university in Jamaica at the tertiary level. On September 1, 2021, I started my new employment at a tertiary institution. From my experience at the secondary and tertiary levels, I have observed various weaknesses within the educational sector in leadership, structure, and policy-making among others.

My love for research developed while doing my Master’s in Business Administration and was nurtured by facilitating research courses or being an academic research supervisor. However, I did not envision doing any personal or further research after completing my Christian Ministry Certification in August 2016. The ‘seed’ to do my research was planted by my Lord

& Saviour, Jesus Christ and then watered by my past principal who suggested that I do my doctoral studies. I was not sure of the field of study, whether business or theology. However, I was directed to Business in Education. My background in business and experience in education developed my research interest.

1.2 Context and Initial Motivation for the DBA Journey

My interest and motivation for this research topic developed because of my profession as an Educator. In addition, my work functions and experience afforded me the knowledge and awareness of the difficulty newly elected school leaders face in the capacity of principals, vice principals, and senior teachers. School leaders are often blamed for poor school performance as numerous reports have indicated poor leadership as a reason for poor performance within the schools. The sector cannot be improved by trying to fix the symptoms, the cause of this problem must be identified and addressed. This prompted the need to explore the movement of educators from one role (exit) to their new roles (entry). To understand their process into a new role, the issues or challenges faced, the impact of their transition on self and the school outcomes.

This research seeks to explore the experience of educators in their transition to school leadership roles in Jamaica. This chapter provides an introduction and a blueprint for the research. It seeks to provide a guided plan of action for practice. The aim and objectives provided the framework for the exploration of literature which determined the research questions. My philosophical perspective and the research problem guide the research approaches, methods, and design.

1.3 Jamaican Educational Sector

The educational landscape of the 21st century is continually changing and even more so during the timespan of this research. The sector has notably altered due to the coronavirus disease of 2019 (COVID-19). However, the Jamaican government's long-term development plan for the sector continued. The transformational plan for the country was developed in April 2009 and is called the “Vision 2030” plan to improve national development, to transform the country into a place of choice to live, work, raise families and do business (Planning Institute of Jamaica, 2019).

For this to take place efficiently and effectively, the government has embarked on reforming the educational sector. By committing to “well resourced, internationally recognised, a values-

based system that develops critical thinking, life-long learners who are productive and successful and effectively contribute to an improved quality of life at the personal, national and global levels” (Planning Institute of Jamaica, 2019).

The Jamaican government should be applauded for its consistent efforts and maintenance of ensuring quality education for its people. The changes in the school system may be characterized as systematic and revolutionary because the entire nature of the sector has been altered fundamentally. This transformation within the industry includes the design, structure, organization, and culture. The education system has moved to create an epistemological diversity by dispersing the power of knowledge from one to all (Mayne & Dixon, 2020, p. 29). The government has placed emphasis and full attention on establishing and ensuring quality education and outcomes for its pupils and little attention on administration and teacher promotion for the development of the schools.

The National Education Inspectorate (2015) reports have shown that several schools have performed poorly and have serious challenges in leadership, management, and administrative challenges (Nelson, The Jamaica Gleaner , 2016). In September 2015, 522 of the 953 (55%) public primary and secondary schools that were assessed between September 2010 and March 2015 were rated as being ineffective. This is so because they typically do not have 'strong leadership, a clear school mission, quality teaching and learning, a safe and orderly climate, transparent and effective monitoring of students' progress, high expectations and parental involvement' (NEI, 2015, p. 7). Among the many challenges that exist with this arrangement is that, while schools are held accountable for student outcomes, in most instances, the principal is not sufficiently empowered with the required skills and authority to lead and manage their schools.

The Ministry of Education Youth and Information (MOEYI) with the private sector and training institutions have provided leadership and management training to improve the country's education system. The National Council of Education (NCE), the Private Sector Organization of Jamaica (PSOJ), and the Jamaica Teacher’s Association (JTA), among others, have joined the government’s plans to improve the quality of education and leadership (Swell-Lawson & Munroe, 2012).

The Jamaican government have also established strategies, policies, and procedures to equip school leaders and prospective school leaders for the position, such as the National College for

Education Leadership (NCEL) and the National Education Inspectorate (NEI). Both NCEL and NEI have their fair share of challenges and inefficiencies. Such as discrepancies with indicators used by NEI and the low publicity and disinterested aspiring principals to do NCEL programmes. Although there have been few improvements in school leadership and management this has not been impactful on the sector. In 2020 the government implemented the Jamaican Education Transformation Commission with a single charge to research and recommend the guidelines to correct the chronic failure in the education sector (National Education Task Force, 2009). The commission has indicated that there needs to be adequate training of school leaders in change management, strategic planning, financial management, human capital management and corporate governance (Patterson, 2021).

The commission has not discussed the reasons or causes for the inadequacies or failures of these areas in school leadership. Nor have discussed why these school leaders have not been equipped with this training before or during transitioning. However, school leaders in secondary schools have been blamed for focusing on the wrong areas of school management such as school image, inter-school competitions and poor measures of success (Nelson, 2015). These and other misguided focuses are a result of poor leadership that has led to poor academic performance and school outcomes.

1.4 Research Rationale

The government of Jamaica and the Ministry of Education, Youth and Information have made notable changes, improvements and investments in the teaching and learning of its human capital. As a result, there have been varying improvements in the sector, such as restructuring the ministry, universal enrolment of students from early childhood, technological training for educators, and developing the national standard curriculum, among other initiatives. This is commendable for a developing country and is not unnoticed by the Jamaican people.

However, key concerns of leadership and management within the schools remain. The government of Jamaica has implemented changes and strategies to the leadership and management of schools through the Education Task Force, the development of the National College for Educational Leadership (NCEL) and the initiative of the private sector. The National College for Educational Leadership (NCEL) was established in 2011. Its primary function is to develop excellent leadership in the island's public schools and support institutions under the Effective Principals' Training Programme (Ministry of Education Jamaica, 2017). NCEL has developed, implemented, and executed many programs for aspiring and experienced

school leaders. In addition, the Ministry of Education, Youth, and Information have established policies and procedures to ensure that school leaders and prospective school leaders are equipped for the position (Ministry of Education, 2016; National Education Task Force, 2009).

Although there have been improvements in schools' leadership and management, there is still evidence and reports of inefficiency and inadequacies among school leaders. The National Education Inspectorate (NEI) has reported the ineffectiveness of leadership within the schools in numerous reports (Hibbert, 2020). According to Hamilton (2012), failing principals equals falling schools'; there are inferior leadership and management structures within the schools, leading to the unsatisfactory performance of some schools. This continual issue started the need to investigate the root cause(s) of the poor leadership and management of the Jamaican secondary school system. Exploring the root cause means understanding the transitional process from an educator to a principal or school manager. This new knowledge will allow the formulation and recommendation of strategies or programmes that may assist educators in adjusting and performing efficiently in their new roles.

1.6 Research Context

The school's management and leadership are the principal's responsibility; the principal is the chief executive officer of the school which is governed by the School Board and the Ministry of Education Youth and Information. Therefore, the direct management of the plant and human resources are the responsibilities of principals, vice-principals, and senior teachers. This exploration focuses on school leaders or school managers: principals, vice-principals, senior teachers, and school governing boards. The use of terminology school leaders or administrators and senior teachers are used interchangeably and refer to leaders of a given institution who lead and have influence over a group. The theoretical underlining of this research is the transitional process or the moving of teachers from the role of a trained teacher to a principal or senior teacher. The transition from one career position to a higher level may be demanding and challenging. It requires learning and often comes with internal and external conflicts, identity, social relationships with subordinates, culture, and poor performance indicators.

The information gathered was from the personal experiences and perceptions of twelve school leaders such as principals, senior teachers, and grade coordinators. These respondents contributed their time and information to create knowledge and awareness within the sector.

The theoretical perspective of this research is grounded in interpretivism. The Interpretivists approach attempts to understand and make sense of the transitional process and act on their interpretations by using the voices and views of the respondents. This research follows a qualitative approach that uses semi-structural interviews. The method of examination used to understand respondents' experiences was interpretative phenomenological analysis.

1.7 Research Objectives:

To achieve the aim of this research, four objectives have been identified:

- Critically access current literature to ascertain the effectiveness and impact of hybrid management and identify significant themes and strategies of role transitioning that will improve process and sector.
- Explore and explain the experiences, perceptions and challenges faced by educators who have transitioned into managerial roles.
- Examine how these educators navigate career development while shaping professional and occupational identity.
- Develop guidelines for educators who are transitioning into management that would create a conducive, efficient, and effective work environment.

1.8 Organization of Thesis

This thesis comprises six chapters accompanied by several appendices of supporting materials. This chapter provides a background and context to the research. The following chapter, chapter Two is the literature review which is a review of the research literature and related literature of the research. It contains scholarly work on transition by scholars like Van Gennepe (1960), Blake Ashforth (2008) and Catherine Hayes (2020) who have examined the transition processes and developed theories and frameworks of transition. The transitions of technical staff (professional) to managerial or leadership positions have been examined in education and other related sectors. With a focus on the challenges and experiences of those transitioning from one role to another and measures implemented for a successful transition. The chapter is divided into sub-sections such as (a) Transition, (b) Role Identity & Role Transition, (c) Role Entry Experiences of Hybrid Managers, (d) Transition Frameworks, (e) Principals Transitional

Experiences, (f) Continual Professional Development among others. The literature identified shaped the core of the research by providing an understanding of previous research and trends. That led to the development of themes, theoretical framework, research strategies and ideas to undertake the research.

In Chapter Three, the research methodology explains the steps used in collecting information in the research methods and research processes employed in the data collection and analysis. Moreover, the chapter discusses the interconnectivity of the philosophical approaches and the research process and provides a rationale for the design, data collection, data analysis and ethical considerations. This research follows an interpretivist perspective to understanding, interpreting, and making sense of the transition process of educators into school management. Phenomenology, the research design allowed the use of qualitative methods to provide a fresh look at transition through the use of semi-structured interviews of twelve respondents.

Chapter four is the presentation of research findings, which presents the story of respondents based on the questions asked however framed by recurring and important themes obtained after examining the interview scripts. The emergent themes were mapped to identify relationships, connections, and patterns to capture and reflect an understanding of respondents' perceptions and challenges interrelated to the research questions. For instance, the voices of the respondents are felt through the direct quotes that were mapped through the themes and cross-referenced to related respondents or themes.

Chapter Five is essentially the most important as it provides an understanding of the research through the interpretation of the key findings. The discussion chapter begins with a reminder of the research objectives as a guide to the explanation of the findings. The findings of the research were used to create a conceptual model for use by practitioners during the transition process to enhance practice and contribute to knowledge in the sector that is developed in the chapter. The conceptual model has four phases that have been explained and discussed in relation to findings and literature to improve practice. The research objectives are examined and discussed based on the interpretation of findings and relations to other research identified in the literature review chapter. Finally, Chapter Six presents the conclusion, providing recommendations and insights, the limitations of the research, and potential contributions to future academic research and professional practice.

1.9 Summary

This chapter has explained the background and context of the research and the rationale for why it has been undertaken. The aim and objectives of the research have been presented, and the underpinning consideration for the thesis is shared with the reader. The chapter structure has been outlined, and on this basis, the thesis will proceed with a detailed exploration and examination of the underpinning literature.

2. Literature Review

2.1 Introduction

This chapter provides a background to the study by exploring the various literature on the transitional process from both a technical and professional role to a management position, the complexities of transition, the transitional process, and the unseen challenges faced by educators.

The transition of educators to school administrators is a change of functions and responsibilities as leaders who are expected to lead whilst managing human, capital, and physical aspects. This transition from one role to another is likely to be described as a multidimensional or complex process, as transitions impact processes that may be operational, psychological, or relational (Hayes, 2020; Meleis, 2010). The complexity of the process is enhanced with a change in their roles and functions from a technical to a management role. The change from a technical role to a leadership role is often led without insight on operations, culture of the work environment and human capital (Gentry et al., 2014; Hill, 2003). The focus is usually on achieving the promised outcomes and implementing new strategies and agendas. In which leaders likely find themselves grappling with a multitude of facets within both them and their organisations' functioning that they must consider to achieve desired outcomes in which they were not prepared (Hayes, 2020, p. 1). Schumacher and Meleis (1994) and Hayes (2020) holds the view that leaders having a perceived idea and expectations of the outcome of the transitions may be unrealistic as the transition requires knowledge of what to expect from a transition, and knowledge about how to negotiate a new situation. "The ideas, methods and approaches for successful implementation seem intellectually achievable at the outset. However, a different story emerges when they attempt to implement strategies, leaders find it challenging to navigate their way through the complexities of transitions to deliver effective transformations. The impact is that they get in their own ways and unintentionally derail their change and transformation agendas" (Hayes, 2020, p. 24). The complexity of the transition process is addressed by other scholars through the various elements within the transition process such as changes, awareness, skills, knowledge, role identity, role boundaries, culture among others (Hayes, 2020; Ashforth, 2008; Meleis et al., 2000). Therefore, understanding this multifaceted process such as the types of transitions, the influences of transitions, changes inferred during the process and the challenges may help school leaders and policy makers to successfully navigate work transitions (Hayes, 2020, p. 3). Moreover, it may help policy makers within the

education sector in the implementation of policies to improve challenges faced during the process (Fouad & Bynner, 2008, pp. 242-243).

Pertinent literature available within the research area was obtained through a comprehensive search of academic and organisation information by primary and grey literature. The Edinburgh Napier University library's electronic search engines, such as AB/Inform, ProQuest, EBSCO, SAGE, and Emerald publications, provide the primary sources' main constituents, supported by recommended materials from supervisors, fellow researchers' participants, and colleagues. The information sourced and presented depicts transitional leadership with references to the health industry. Within the literature, there was evidence of a high degree of studies related to the transition of nurses and doctors into management roles (Moorhead, 2018; Owens, 2019; Ocho, et al., 2020). However, very little was evident relating to teachers moving to senior management positions and how they adjusted in Jamaica.

These literature materials were reviewed to help to provide emerging themes to place the research into context. This context aided with the layout and development of this chapter; the literature chapter begins by examining in-depth the nature and components of transitions. The elements of role transition and role identity are examined through discussion of hybrid managers. Next, the chapter explores the theoretical concepts and frameworks related to transition and the challenges. It then examines transition mechanisms and strategies that employees use to adjust to their new roles. Finally, the preparation techniques & methods for successful transition were examined, including the role of Continual Professional Development (CPD) on transitions. Based on the empirical evidence and the literature resources reviewed, the researcher developed the research questions to research the research problem further.

2.2 Transition

Arnold Van Gennep (1960) describes transition in its purest form through the life of an individual in any society "as a series of passages from one age to another and from one occupation to another" (p. 2). Gennep (1960) explains, a transition being group to group, and from one social situation to the next, as a man's life comes to be made up of a succession of stages with similar ends and beginnings: birth, social puberty, marriage, fatherhood, advancement to a higher class, occupational specialization, and death (p. 3). Gennep (1960) explains the progression of ceremonial patterns and cultural groups as a rite of passage through the rites of separation, rites of transition, and rites of incorporation. The rites of separation are

prominent in funeral ceremonies, rites of incorporation at marriages and rites of transitions play an important part in pregnancy, adoption, and remarriages (Gennep, 2019, p. 11).

The first, the 'separation phase' makes symbolic reference to loss, to leaving the previous state, or loss of a position achieved in life (Gennep, 2019; Ashforth et al., 2000). It is the detachment from a familiar environment and former role and entering a very different and sometimes foreign routine that they are forced to adjust to and become familiar with. The transition phase, the 'liminal phase' is the crisis phase, characterized by uncertainty, disruption of order, and suspension of the structure of society. In this stage, the individual prepares for the new status and learns the appropriate behaviour for the new stage they are entering. The third phase is the 'incorporation phase,' entailing a new social identity and marking the start of a new period of life (Ashforth, et al., 2000; Gennep, 2019). Arnold Van Gennep (1960) states, "I propose to call the rites of separation from a previous world, preliminal rites, those executed during the transitional stage liminal (or threshold) rites, and the ceremonies of incorporation into the new world post liminal rites" (p. 21). Anthropologist Victor Turner fused Van Gennep's model and gave particular emphasis to the liminal rites within the second phase (transition). Liminal "entities are neither here nor there; they are betwixt and between the positions assigned and arrayed by law, custom, convention and ceremonial" (Victor, 1969, p. 95). The person going through the rite of passage existed in a sort of "betwixt and between" state, a kind of limbo, where their identity was temporarily suspended (Thomas, 2012,p.1). Individuals in liminal phase are no longer classified as what they were but are not yet classified as what they are becoming, which is related to self-redefinition (Wilson , 2019, p. 12). In this stage, the individual is becoming or changing (a redefinition of self) and may feel overwhelmed, confused, and detached (Ashforth, et al., 2000, p. 478).

Apart from anthropology, transitions have been discussed to include in other disciplines in later years, such as counselling, industrial and organisational psychology, human resources, education, and nursing (Wilson, 2019, p. 3). Ashforth et al., (2000) and Meleis et al., (2000) have done vast research on transition and developed theories. Meleis et al., (2010) and colleagues in the field of nursing have developed theories in transitions that is based on three paradigms: role theory, lived experience, and feminist postcolonialism. Other scholars have presented key studies on transitions in areas such as movement from military to civilian, micro and macro work in role transitions, rites and passage of principalship, how masters students can transition to professional practice, students starting university, women during pregnancy,

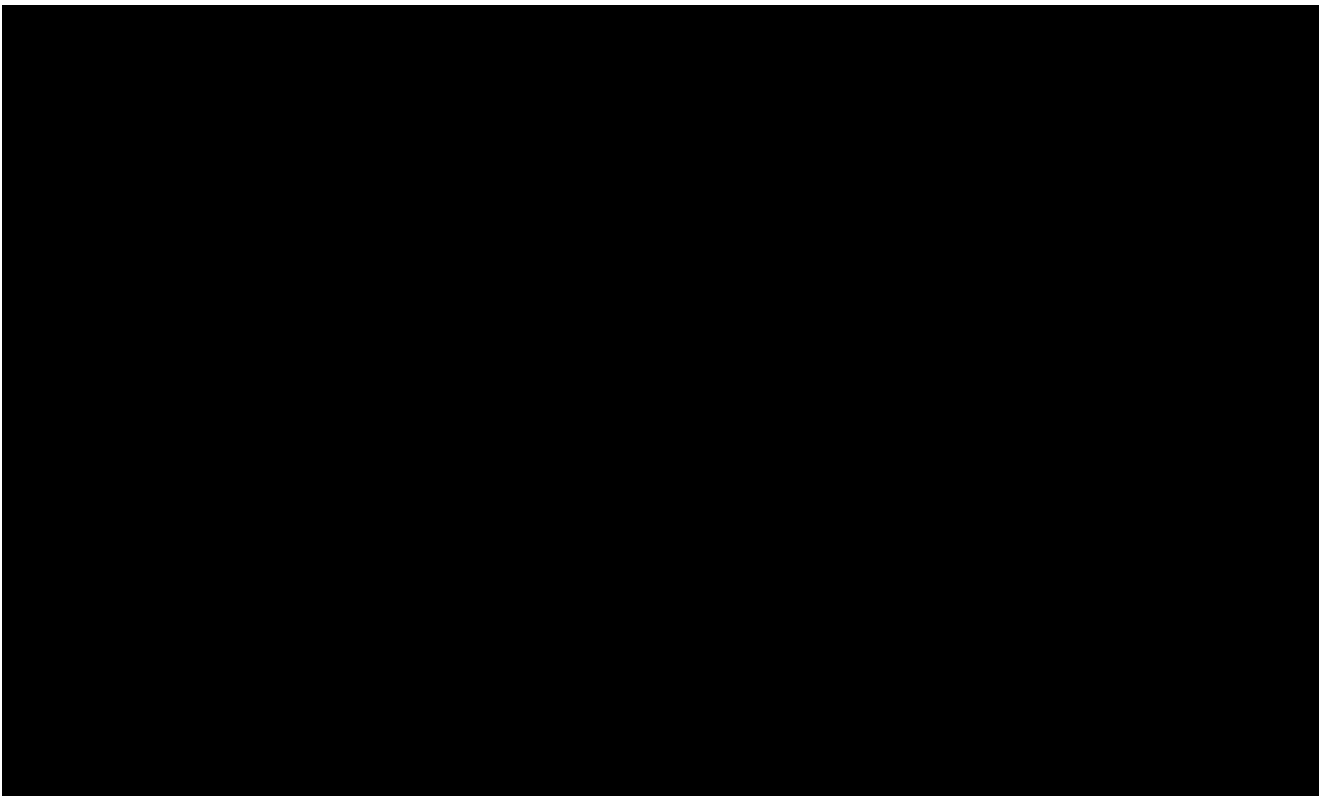
immigrants in a new country, and patients experiencing an illness (Wilson, 2019, p. 3). These studies have related transition as a movement through personal and professional experiences and events. Yateem and Docherty (2014) states that transitioning is the passing or passage from one place, condition or action to another or the development, evolution, or progression from one state to another (p.35). Fox and Combley (2014) states transition as a change to a new state or the start of using something new (p. 1953). Other scholars such as William Bridges (1979) view transition and change differently. William Bridges (1979) describes Transition as the inner psychological process that people go through as they internalize and come to terms with the new situation that the change brings about (Bridges, 2021). Im (2009) argues that although transition is a “flow and movement over time”, transition infers changes of “identities, roles, relationships, abilities, and patterns of behaviour;” and involve processes of movement and change in “fundamental life patterns” (p. 423). Transition is multi-dimensional and maybe characterized in many ways and includes various aspects of life and society. Gennepe (1960) and Turner (1967) classifies transition as life passages or developmental changes due to changes in life cycle. Transition is also classified by other scholars as situational (changes in circumstances in personal or professional life), organisational (changes in the organisational environment impacting individuals), or health-illness (changes due to developing an illness or health condition) (Meleis et al., 2000; Meleis, 2010).

Ashforth et al., (2000) characterized transition as three main domains of everyday life role transitions involving work (p.473). These domains are work-home transition (i.e., commuting, and home-based work), work-work, or at-work transitions (e.g., between one's roles of subordinate, peer, superordinate and organizational representative; between multiple job) and work- 'third place' transitions, that is, informal public life (between work and other social domains, such as a church, health club, and neighbourhood bar) (Ashforth et al., 2000, p. 473). Work-work or at-work transitions may be voluntary or involuntary and is attributed to social, economic, and corporate policies (Fouad & Bynner, 2008, p. 242). How, why, and where an individual transitions to depends on social, economic, political and factors. For instance, transition is influenced voluntarily based on personal agency, time, and much consideration. In contrast, an involuntary transition may be due to environmental and technological changes that may be sudden, such as joblessness, widowhood, or mergers (Fouad & Bynner, 2008, p. 243). The complexity of the transitional process is evident based on its multidimensional nature and various factors that must be considered such as the psychological challenges. Bynner and Fouad (2008) explains that a transition of young people from school to work, and then from

work to other work and from work to nonwork face several psychological challenges that may be exacerbated by both government and corporate policies surrounding transitions (p.242). These and other factors must be carefully examined, as they influence the success of one's experience and outcome. The complexity of transition is depicted in Meleis et al., (2000) Models of Transitions Theory (Figure 1), which highlights key elements of the transition that should be considered.

Figure 1

Model of Transitions Theory from Experiencing Transitions: An Emerging Middle-Range Theory



Note. Model of Transitions Theory from Experiencing Transitions: An Emerging Middle-Range Theory, (Meleis et al.,2000)

The process of transition is ‘complex, ambiguous and messy’ as the complication of the process could be because of unpreparedness, socialization, culture, experience, and the nature of those

involved (Croft et al., 2015; Ciampa & Dotlich, 2015). Ciampa et al. (2015) explains two main factors that cause the complexity of transition as the adjustments required by significant players engaged on the company side of the equation and their interactions and secondly, it involves the systemic adjustments in the organization that accompany the transition (strategically, operationally, politically, and culturally) (p.7). Culture is an essential component in transition, and it impacts the outcome of the process, as it forms the foundation for everything in an organization. Culture is how the organization collectively acts or reacts given a set of circumstances (Whipple, 2014, p. 129). Therefore, it is essential to understand and manage it. The pattern and behaviour of employee's attribute to the organisation's culture (Whipple, 2014, p. 138). Cultural systems are shaped to reinforce certain rituals and traditions that have evolved. These are the core beliefs that are unique in each organization. These beliefs are not questioned but are reflected in each of the layers above. These beliefs are accepted as "the way people do things around here" (Ciampa & Dotlich, 2015, p. 43). The clash of cultures causes severe problems during every transition (Whipple, 2014, p. 139). The organizational culture is one of the most important areas to understand after agreeing to a positional offer; the culture is a window into how people behave (Ciampa & Dotlich, 2015, p. 99). Knowing the key employees, their departments and influential leaders gives insight into the organization's culture. This information will help determine whom to meet with regularly and who need to make sure is engaged (Granko et al., 2017, p.560). Knowing the culture helps in assimilating the organization, making decisions, and developing recommendations for the change agenda (Granko et al., 2017, p.560).

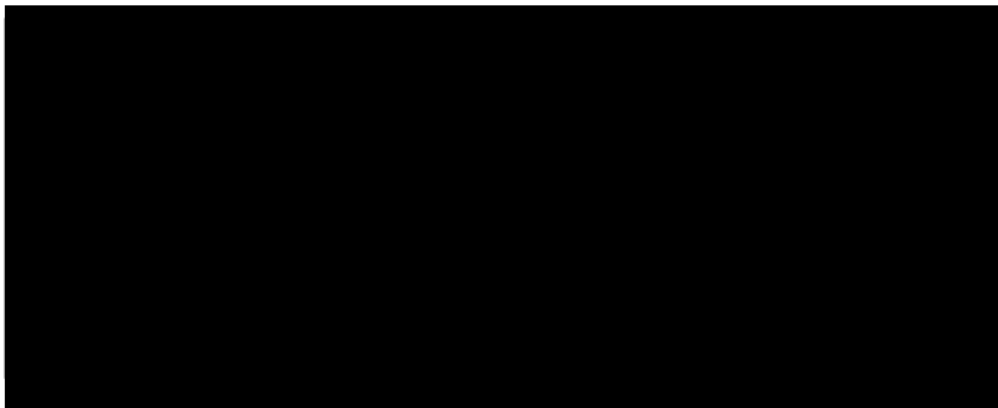
2.3 Role Identity and Role Transition

A role is a character assigned or assumed, a socially expected behaviour pattern determined by an individual's status in a particular society, or a function or part performed, especially for a specific operation or process (Owens, 2019, p. 159). Identity is referred to as one's perceived

self; a position in social space defines a role with a concomitant set of expectations toward the role holder (Spehar et al., 2014, p. 358). Role identity is defined as the goals, values, beliefs, norms, interactions styles and the time horizon associated with the role (Ashforth et al., 2000, p. 475). One's professional identity is the self-perceived attitudes, values, knowledge, beliefs, and skills that are shared with others within a professional group in the workplace obtained through a socialization process (Owens, 2019, p. 159). Ashforth et al., (2000), an originator on role transition, defines role transition as the psychological movement between roles, including disengagement from one role (role exit) and engagement in another (role entry) (Ashforth et al., 2000, p. 473). Figure 2 illustrates role transition as defined by Ashforth et al., (2000) a role transition typically involves movement between settings and circumstances, that is, through space (commuting from home to the office), time (ascending a career ladder) or both (p. 5). Meleis (1975) states that role transition can be defined as a change in an individual's self-identity within a certain context that occurs through the development of new knowledge and skills, as well as a behaviour change, role relationships, interactions, expectations, and abilities (Meleis, 1975, p. 264).

Figure 2

Role Transition Model



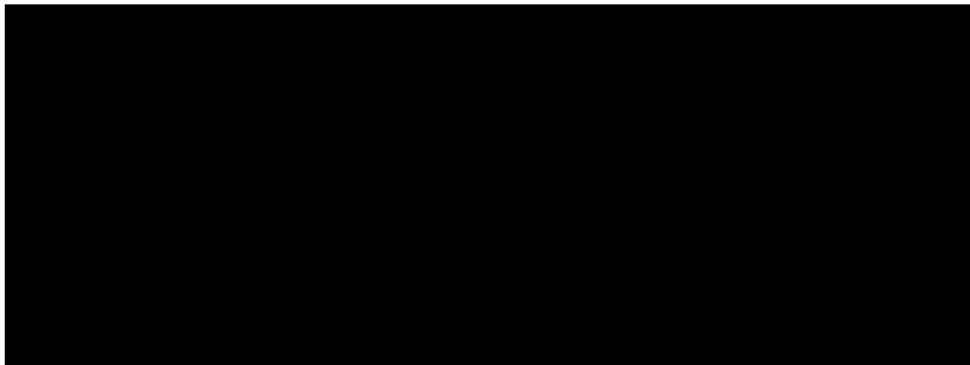
Note. Role Transition Model as presented by Ashforth (2008)

Figure 2 illustrates the movement from a pre-existing (past) role to a future progression (new) role. Similarly, Lewin's (1951) field theory of 'unfreezing- movement- refreezing' is

applicable to role transitions and maintains that various social states are neither fixed nor permanent; rather, they are “quasi-stationary equilibria” (p.199). The field theory is applicable to role transitions because the transitions, by definition, involve movement across boundaries, across the spatial and temporal makers that circumscribe positions and their context (Ashforth, 2008, p. 11). According to Ashforth (2008) unfreezing corresponds to role exit and freezing corresponds to role entry (p.11). The seminal work of Gennepe (1960) rites of passages is also relevant to role transitions with the movement from one group to another group (p.2). The purpose of the rites is to signal, both to the individual and members of the role set(s), the changes in roles and associated role identities and status, allowing all concerned to acknowledge the change. This acknowledgement serves to either deinstitutionalize (in cases of role exit) or institutionalize (in cases of role entry) the individual(s) in the role and to affirm the network of roles in the face of a change of role occupants (Ashforth, 2008, p. 12). Role transitions is identifiable through the work of Lewin (1951) and Gennepe (1960) as rites of separation (unfreezing), facilitates role exit, rites of transition (movement), facilitates the journey between roles and rites of incorporation (refreezing) which facilitates role entry (Ashforth, 2008, p. 13). Figure 3 illustrates the transitional process with the works of (Lewin, 1951) and (Gennepe, 1960).

Figure 3

The Transition Process



Note. The Transition Process: as described by Ashforth et al., p. 478.

The identification of self is important and role exit plays a significant role during transition within the new role. Role entry involves a negotiation between individuals and organizations. Role entry fosters surprise and uncertainty, galvanizing newcomers to learn about and adapt to the situation (Ashforth, 2008, p. 15). This process is usually mutual in that members of the

departing individual's role set must withdraw their role-based attachments to the individual (Ashforth, 2008, p. 15). However, role exit to the role entry may be transferred positively or negatively and identities may be cast away when a role is exited or recreated to fit with changing social circumstances or environments. A role entry is also facilitated by selectively forgetting aspects of former identities that conflict with the current role identity (Ashforth, 2008, p. 15). Nonetheless, one's identity may transition into a new role that will help in the forming of new identities that may be helpful or a hindrance in the transitional process. When persons exit a role that matters, persons retain elements of this role as part of their new self-concept. The transition from one role to another and the forming of identities in the new role is complex (Bridges & Bridges, 2016; Hayes, 2020).

Ashforth et al. (2000) in the article *All in a Day's Work: Boundaries and Micro Role Transitions* explain the complexity of the role transition through the crossing of boundaries between home and work. Role transition from home to work may be segmented as high contrast in role identities, and inflexible and impermeable role boundaries, or the roles may be integrated as low contrast in role identities and have flexible and permeable role boundaries. High segmentation decreases the blurring of roles but increases the magnitude of change crossing role boundaries. The high segmentation may cause the transition to be difficult, as there may be a 'spillover' in the magnitude of change. Research on role 'spillover' by Ashforth et al. (2000) indicates that moods, stress, and thoughts generated in one role domain often influence or spill over into another domain/role.

Hogg et al. (2004) discuss changes in the role of mothers in households through their experience of empty nesters. They discuss the impact of the changes on the mothers in adjusting, revaluation and reassociation that takes place. The transitional process was affected by features, situations, and time; however, the physical location remains the same. For empty nester women, the experience of these changes in their enactment of mothering marked a major role transition that had blurring roles and became successful because of the re-evaluation and re-definition of self and spillovers into the role until adjustment. Although this transition is not home to work or work to work, the research had significant findings related to other research on transitions and role theories, such as Genep's (1960) rites of passage, role transition and role identity. Exit from one role and entry into another is often facilitated by personal and collective rites of passage that signal to the individual and members of his or her role set(s) the change in roles and attention identities (Ashforth et al., 2000, p. 486). The significance of the rites, which may include the presence and involvement of others, and the manipulation of

emotionally charged symbols, is that rites help in forming and becoming during the crossing of boundaries.

Hogg et al. (2004) state that during the separation phase, the *self* was deconstructed so a new identity was formed. A new identity was formulated through the re-socialization of the new role, and they made changes to their routines. Although they experienced their children moving away as a loss, they generally successfully negotiated the pain of separation as their children left home. They readjusted the tasks of mothering to the re-alignment of the boundaries between the household and family (Hogg et al., 2007, p. 253). In time, the mothers were able to incorporate this new role into their lives and household by adopting new methods and routines.

During role transition, the construction of identity is formulated by the ‘past, present, and future roles. This may be positive or negative for the organization but has complexities based on experiences, levels of role transitions (macro or micro transition), and the individual’s values and norms. Fouad & Bynner (2008) implies that understanding the transitioning of roles requires exploring the individual internalized story or experience or social interactions, and the formulation of role identity and impact within the organization. Socially desirable role transition should represent progress in an accepted social order. Any regression, loss of status, title, or prestige, for example, represents a deviation from what is socially valued and expected (Ibarra & Barbulescu, 2010, p. 140).

There is shared agreement that identities are multiple, mutable, and socially constructed, but coexist within a self that integrates diverse experiences into a unity (Ibarra & Barbulescu, 2010, p. 137). It follows that identity will change during role transition. With role transition, the formulation of self or identity forms the continuity between who they have been and who they are becoming, as well as obtaining validation from relevant parties (Ibarra & Barbulescu, 2010, p. 136). The transition process is situated in a tradition of socialization research that argues that identity changes accompany macro role transition; because new roles require new skills, behaviours, attitudes, and patterns of interpersonal interactions, they may produce fundamental changes in an individual’s self-definition (Ibarra & Barbulescu, 2010; Hill, 2003). The transition to work-related roles is fostered by the experiences of past and present occupations. It is a process that moulds self through occupational/ professional identification and not the designed roles, but the experiences.

2.4 Role Entry Experiences of Hybrid Managers

The transitioning of technical or professional staff to managerial roles may be challenging due to a lack of exposure to organizational culture and management skills. According to Montgomery (2019), it is often a challenging and confusing time because the technical knowledge and skills that initiated the promotion are the very skills that ‘have to take a back seat’ (p. 1). Every new leader is hired based on an established track record throughout a career (Evans, 2019, p. 1). However, its adaptability and the unlearning of specific behaviour set the foundation. Therefore, the aim is to amalgamate the old skills with the new managerial skills, which is not an easy task. Evans (2019) uses the paradox by Marshall Goldsmith to summarise timeless advice of the transition process into a new position “What got you here won’t get you there” (Carney Sandoe and Associates, p. 2).

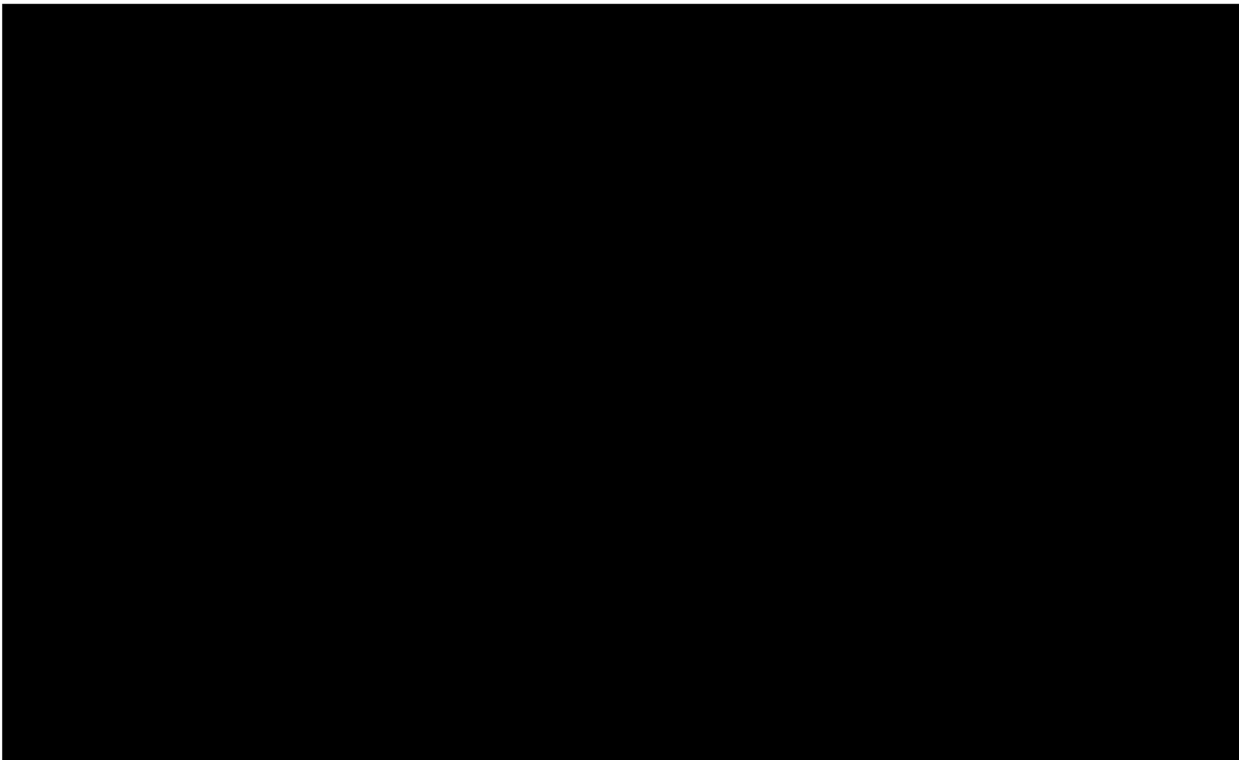
Hybrid managers are individuals with a professional background who take on managerial roles, requiring them to move between different organizational groups (Croft et al., 2015, p. 381). These individuals usually move from a professional or a technical position upward to another level, possibly two or more levels. This may be traced through the original work of ‘Keen (1986), Lockett (1987) and Earl (1989)’ who have later evolved and revolutionized the functions of managers (Earl & Skyme, 1992, p.162). In the 20th century, hybridization or hybrid managers were discussed and researched across various sectors and multiple disciplines and their potential strength comes from their ability to view organizational issues through ‘two-way windows’, reducing resistance to, and encouraging uptake of managerial reform by professional groups (Croft et al., 2015, p. 381).

Technical skills are of greater importance than management expertise for the selection of leaders. However, a factor often overlooked is developing leadership skills and knowledge; the context of responsibility, the focus of delivery, and where leaders focus on, is an evolving process (Hayes, 2020, p. 51). In the discussion of the career transition of leaders, Hayes (2020) developed a three-tier process for the movement from a practitioner(technical), team leader, department leader and strategic leader. The practitioner is focused on acquiring the necessary skills and knowledge to meet the goals of the team. When practitioners integrate and apply these different aspects to achieve outcomes, they are promoted to become team leaders (Hayes, 2020, p. 52). The shift to the other tiers of team leader, department, and or strategic leader requires additional knowledge and skills. The focus is not on the self; in a team or group, the focus on the self is minimal and decreases throughout each tier. The duties and responsibilities

are different and increase at each level with the development of new skills. For instance, the team leader requires enhancing communication skills and developing approaches for building effective relationships and understanding the interconnected dynamics of team functioning. Whereas the level of strategic leadership requires fostering a performance culture and operational environment that aligns the organisation with evolving industry and market trends while seeking opportunities for innovation (Hayes, 2020, p. 53). Figure 4 illustrates the career transition process of leaders and their process development.

Figure 4

Leadership Career Transition



Note. Leadership Career Transition (Hayes, 2020, p. 53)

Hayes (2020) and Earl and Skyme (1992) state the selection of leaders as being based on performance and achievement in the technical area. However, this contributes to the challenge and the complexity faced by leaders that may lead to efficiency. Hayes (2020) states the experience in organisations as one where leaders find themselves in senior leadership positions

with mismatched skills and knowledge, discovering that their frames of reference and practices are out of context with what their leadership roles require (Hayes, 2020, p. 54). Leaders must shift through the levels of tiers associated with the new role and acquire the position's skills, responsibilities, and knowledge.

Bresnen et al., (2019) focus on how individuals transition into managerial hybrids. The research discusses how career trajectories and organizational experiences form hybrid managers and their identities. The research shows that transitioning into a managerial role is shaped by professional and organizational experiences. They argue that the challenge of moving from a technical or professional identity to a management identity is reconciling professional norms or values with management expectations and organizational goals. According to Reay et al., (2017), through lengthy educational and socialization processes, professionals develop intense connections to their work and come to define themselves concerning the goals, values, norms, and interaction patterns associated with their work (p. 1045). Owen (2019) stated that in their research that “eight studies identified that role transition and change in professional identity for nurse practitioners began while they were enrolled in their nurse practitioner education programs, through learning, socializing experiences, and the postgraduate period of practice” (p. 161). However, doctors who transitioned into clinical management positions enhanced their professional identity rather than replacing it in their management roles. The doctor's professional identity was recognizable and attributed to socialization. Doctors were socialized into viewing management and leadership in the form of individual traits and attributes, in which medical knowledge and experience constitute an integral part (Spehar et al., 2014, p. 361). Whereas according to Spehar et al. (2014) nurses adapt quickly to their management roles because of their socialization and professional background. According to Bresnen et al. (2019), nurse hybrid managers shared a belief that moving into management was both a natural progression and one that allowed them to combine clinical interests with opportunities to exert greater executive influence (p. 1355). However, there is an idea among nurses that being a nurse with good clinical skills and expertise does not necessarily equip you to become a good manager (Sambrook, 2006, p. 57).

Hill (2003) identifies that managerial identity develops towards the end of the first year of transitioning as a new manager as they are immersed and understand the role. “As the Managers began to incorporate the superiors’ point of view and reconcile it with numerous expectations of the others around them, they began to broaden their idea of what it means to be a manager. They had to come to understand that overload, ambiguity, and conflicts were inherent and learn

to live with imperfect solutions and with the knowledge that they could not be experts about everything” (Hill, 2003, p. 20). The formation of managerial identity developed during the transitional period, it is affected by the culture of the organization, training offered, personal capacity and the ability to learn on the job. The construction of managerial identity was formulated by changing perceptions of themselves, learning from experience, solving problems, and adopting a managerial agenda. Bresnen et al. (2019), identified that professional experience played a key role in the functioning of a nurse hybrid identity. From the research, it was concluded that various factors aid in the development of a hybrid manager includes, culture, socialization, organization position, longevity, professional background, and experience (p. 1363). The role identity of senior teachers or principals may be altered based on personal, social, and professional experiences that may be negative or positive. The transitions of newly promoted managers lead to a significant role transformation that calls into question their self-concept and identity (Austin & Carnochan, 2020, p. 37). According to Hill (2003), new managers first act like managers then they become managers when they understand the facts and puzzles of managerial life (p. 21). Hill (2003) perspective of the formation of managerial identity is similar to Austin and Carnochan's (2020) practitioner's framework identify four (4) stages that characterize transition: (1) Emerging, (2) Becoming, (3) Acting, and (4) Thriving (p. 38). Austin and Carnochan (2020) describe the first stage, emerging, as the period in which a specialist is identified as a prospective generalist for a role in management. The second phase, becoming, a manager often begins at the point of promotion and is marked by negotiating the role and reconstructing elements of identity. This is the shifting and letting go stage, especially the moving away from the technical skillset. The shifting and letting go stages is key in how an individual exit and entry their role as this prevents spillovers and transitional blindness (Hayes, 2020; Ashforth, Role Transitions in Organizational Life: An Identity-Based Perspective, 2008). The third stage, acting, marks the period where new managers gain role clarity and begin acting in a role, they often are confronted with competing demands. Hills (2003) identifies the acting and becoming stages, however it is proposed that the acting takes place before the becoming. These stages are crucial in the forming of managerial identity and Austin & Carnohan (2020) states that new managers often learn to “become” and “act” as managers simultaneously by thriving in one area and continuing to construct a managerial identity in another (p. 40). In the fourth stage, thriving, new managers find themselves thriving as they begin to move away from crisis management toward managerial leadership, marked by comfort and competence in planning while

effectively managing the present. These stages are important to understand the transition and transformation of technical staff moving specifically into management.

2.5 Transitional Frameworks

This section gives a detailed account of two transitional frameworks from experts in transitions and organisational change. This section begins by outlining the difference between the term's 'change' and 'transition' in the workplace. This is followed by William Bridges' (1979) framework, which is the foundation and premise of other frameworks such as Hayes (2020). Hayes's (2020) transitional model is closely aligned with the *Marco* transitional process, due to her extensive research on transition in leadership. Hayes's (2020) model depicts areas of challenges faced by leaders in the process and development of key areas in the process. According to Leybourne (2016), the essence of the various models and techniques is to identify the different stages to be navigated by individuals changing, and different perceptions of these stages engage, influence, and affect the speed of transition of those individuals (p. 36). These two frameworks encapsulate the concepts, theories, and processes previously discussed, and as such, should be key in discussing and developing the findings in this research.

The terms 'change' and 'transition' are used interchangeably however, they are very different. 'Change' is the circumstantial situation (event) in which one finds oneself, and 'transition' is the psychological processing that occurs as a result of that change (Shy & Mills, 2010, p. 419). A simple explanation of change is when something starts or stops or something that used to happen in one way starts happening in another (Nortier, 1995, p. 33). Transition is not an event nor a period but is a personal internal process that is experienced. Change triggers in the individual the start of a process of personal transition, only the outcome of which will make it possible to say whether the change has been successful or not (Nortier, 1995, p. 33). Transition is a movement that speaks to how it was experienced. If the experience was easy or difficult and the length of time for adjustment (Nortier, 1995, p. 34).

The transitional process is not focused on the occurring change, but on the ability to effectively transition from the old (comfortable) way of doing business to a new (unknown) way (Bridges & Bridges, 2016, p. 3), that is, letting go of old realities, and old identities before the change or change in role took place. The difficulty in getting this done is getting people through the transitional process. Bridges & Bridges' (2016) three-phase transitional process suggests that the transition process starts with an ending and finishes with the beginning. The three phases

function at the same time and are not separated; people go through as they internalize and come to terms with details of the new situation that the change brings about (Bridges & Bridges, 2016, p. 3) Crucial in the transitional process is the work relation and ethics of employees. The following states the phases, as explained by William Bridges (Bridges & Bridges, 2016, p. 6):

- Letting go of the old ways and the old identity people had. This first phase of transition is an ending when you need to help people deal with their losses.
- Going through an in-between time when the old is gone, but the new isn't fully operational. We call this time the "neutral zone": the critical psychological realignments and repatterning occur.
- Coming out of the transition and making a new beginning. In this phase, people develop a new identity, experience new energy, and discover a new sense of purpose that makes the change begin to work. Because transition is a process by which people unplug from an old world and plug into a new world, we can say that transition begins with an ending and finishes with a beginning.

A significant issue is that leaders and organizations pay no attention to endings. They do not acknowledge the neutral zone (and try to avoid it) and do nothing to help people make a fresh, new beginning, even as they trumpet the changes (Bridges & Bridges, 2016, p. 10). Most leaders begin at the beginning stage, which causes some of the challenges encountered in the process. Leaders must start at the ending phase and not the beginning phase.

The ending phase for leaders is letting go of aspects of the former role. The failure to identify and get ready for endings and losses is the most significant difficulty for people in transition (Bridges & Bridges, 2016, p. 8). Losses can be classified as loss of attachments, turf, structure, a future, meaning, or loss of control. In addition, this phase may include a range of negative emotions such as anger, sadness, anxiety, depression, and confusion. For this, Bridges & Bridges (2016) suggest methods of dealing with this phase, such as treating the past with respect and helping to compensate for the imagined and emotional intangible losses caused by the transition (Leybourne, 2016, p. 29).

The neutral zone is known as the limbo, in-between adjustment and/or the emotional phase. It is the essential phase of the transition process. In this phase, people are not yet comfortable with a new way of doing things and find themselves suspended in an "in-between place" (Shy & Mills, 2010, p. 419). The neutral zone is the region of chaos and confusion, the in-between place, losing the old but still unaware of the new benefits. The neutral zone is both a dangerous

and a suitable place, and it is the very core of the transition process. At this point, repatterning takes place: old and maladaptive habits are replaced with new ones that are better adapted to the world in which the organization now finds itself (Bridges & Bridges, 2016, p. 9). Hayes (2020), in focusing on transition processes, pays keen attention to the complexity of the transitional space. The transitional space is where a person is in the throes of change (Howatson-Jones, 2016, p. 73). It is a process of learning and adjustment, moving from one position of being to becoming. A person enters a transitional space where some possibilities for their development need to be negotiated and where they may become changed people (Howatson-Jones, 2016, p. 73). For Hayes (2020), transitional space is understanding the complex dimensions and dynamics that transitions evoke, and the capabilities to work with them. The complexities are the unknown and known challenges.

There are several suggestions for managing activity within this transition phase, including using temporary support systems and ways of reframing and redefining activities to make them more accessible and understandable to those undergoing transition (Leybourne, 2016, p. 30). In Bridges and Bridges (2016), the beginning phase is after the loss and confusion; new ways of doing things and new understanding and perspectives are developed. In this phase, behavioural or identity changes encompasses a new world view and the relinquishing of preventative, unresolved feelings that impede the change process occurrence, are experienced by people (Shy & Mills, 2010).

Understanding the three phases of transition will provide successful leaders with experiences during the change and implementation (Lewin, 1951; Bridges & Bridges, 2016). The three phases of transition are great tools that leaders may use during the transition from one role to another. Bridges & Bridges (2016) provides guidelines and practical advice for ensuring a successful transition for each phase identified. The three-phase has considered what managers frequently do. That is, “present the beneficial effects of change, present the new policy, plan using programme evaluation and review techniques (PERT) diagrams, involves certain managers in the implementation of the policy, design appropriate and carefully thought-out budgets” (Nortier, 1995, p. 35). Hayes (2020) commends William Bridges for his work and shedding light on transition dynamics. Hayes (2020) cited problems with the neutral zone and the application of the suggestion for that particular phase. Although she tried to apply the suggested principles to our organisational experiences, the impact felt like the equivalent of stepping into a black hole (Hayes, 2020, p. 10). The neutral zone was described as an

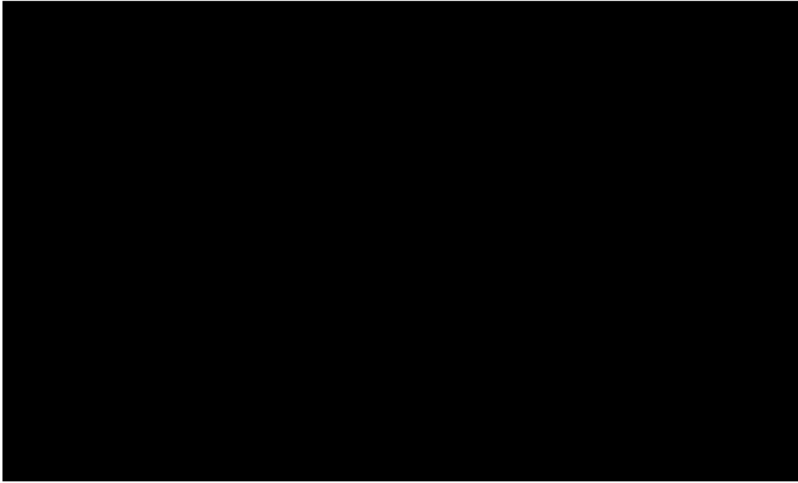
ambiguous unknown context that is all about surrendering which Hayes (2020) states is not a simple straightforward task (p. 10).

The process of transition includes learning and adaptation; it is a learning curve that presents learning challenges (Cheng, 2023; Billett, 2002). New leaders must learn about the organizational culture and critical or influential persons before implementing change (Watkins et al., 2014; Ciampa & Dotlich, 2015). This will eliminate tension, future conflicts, and challenges (Hill, 2003; Ciampa & Dotlich, 2015). So often, new leaders are so anxious to make their impact or prove their worth for selection that they start implementation without understanding their environment (Ebaugh & Rose, 1998; Gentry et al., 2014). Hayes (2020) has combined the knowledge of her thirty (30) years of practice on transitional leadership and applied research to develop a clear theoretical framework of transition. Hayes (2020) establishes that there are challenges within the transition process, those hidden and known. Hayes's (2020) framework offers an understanding of the complexities and unseen aspects that influence all transitional journeys (p.7). Especially *how* and *why* the transitional space led to the dysfunction and destruction of leadership outcomes.

In any attempt to start a new role or position, most new managers or leaders may suffer a symptom termed 'transitional blindness' due to the lack of observation of the transitional space (Hayes, 2020, p. 8). Several factors may contribute to transitional blindness; however, Hayes (2020) highlights three elements: oversimplification, haste, and impatience. 'Oversimplification' refers to the use of simplified terms and a narrow-focused agenda. 'Haste' is explained by the leader's intention to deliver; in a rush to deliver tangible outcomes and show practical results, leaders can often be reluctant to invest time and effort in exploring the transitional space (Hayes, 2020, p. 8). Finally, 'impatience' is acting into the symptoms of oversimplification and haste without proper understanding of the roles and moving into execution and delivery. Leaders are so focused on making an impact or changes that they are focused on their agendas to execute and deliver. Driven by a result-oriented and narrow focus, leaders are unaware of the seen that was unseen or the 'simple unseen'. The lack of foresight and understanding of the organization causes 'leaders to become unable to see or grasp the specifics of what the transformation process requires' (Hayes, 2020, p. 9). Figure 5 depicts Hayes's (2020) transitional blindness in which new leaders/ managers move from their intention/ agendas to implementation before getting acquainted with transitional space or environment.

Figure 5

Transitional Blindness



Note. Transitional Blindness (Hayes, 2020, p. 8)

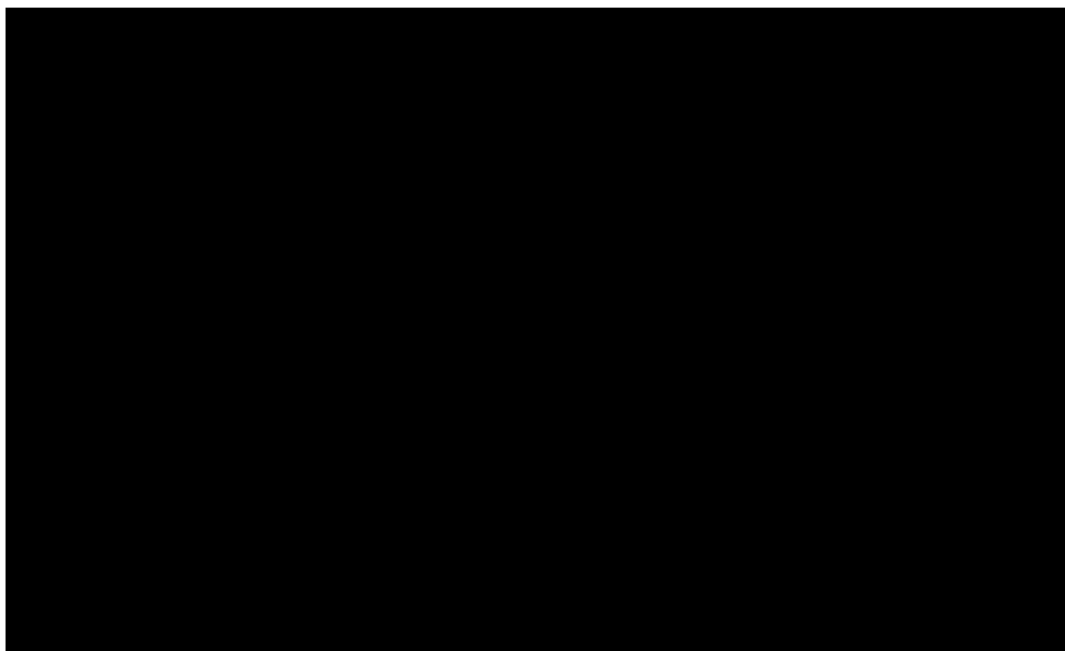
The knowledge of the transitional space and how to navigate it is crucial for those moving from one role to another. Hayes (2020) states that understanding the reasons for the transitional space's complexity and the challenge is a key component for success. There is undoubtedly immense information on transition and aspects of transitional space, but limited information on the reasons or understanding. According to Hayes (2020), a greater depth of insight into the transitional space is a core requirement to support leaders and organisations to succeed with their challenges of today. This is true and evident, but having a holistic understanding of transition and the tenet of transition is essential for the future development of new leaders and success.

Hayes (2020) developed a transitional process using Buddhist ideology and a framework of transcendence. 'Transcendence' is explained as the moving or journeying process from one step to another. It is a journey of stepping from something known into an unknown context, not knowing what the pathway ahead may hold (Hayes, 2020, p. 21). The idea of bardo is referred to as the intermediate state or any time of transition of the ending of one thing before the beginning of the next (Wegela, 2016). These endings and beginnings are 'between' or movements or role transitions such as the beginning of a relationship, the death of a loved one, the end of one's career and the beginning of retirement (Wegela, 2016; Ashforth, 2008). In Buddhist teachings, bardo times are regarded as great opportunities and all of the gaps in the

flow of experience are bardo moments. In Buddhist teachings, bardo times are regarded as great opportunities and all of these gaps in our usual sense of flow of experience are kinds of bardo moments (Wegela, 2016). These experiences of transitioning have gaps that appear and interrupt the continuity of life after the loss of one's old reality (Rinpoche, 2022; Wegela, 2016). Hayes (2020) uses the Tibetan Bardos' philosophical concepts of Buddhism regarding the experiences of life, death and rebirth as it represents stages of transition, evolution and transcendence as well as aspects of lived experience that are situated in the context of the past that has occurred, and a future, that is yet to be manifested (p. 18). The process is depicted using four phases of Bardo's experiences: 1. Natural Bardo of this life 2. Painful Bardo of dying 3. Luminous Bardo of Dharma 4. Karmic Bardo of becoming (p. 18). Hayes's (2020) four phases include phase one, **Shifting**: dimension/s of inner/outer experience begin to shift, phase two, **Ending**: aspects of familiar inner/outer experiences end, phase three, **Emerging**: new/different aspects begin to emerge and phase four, **Forming**: new dimensions and facets start to come into form. Figure 6 illustrates Tibetan Bardo's four phases integrated with Hayes's phases of transitional organizational experiences, where transformation into new/different takes place when the whole cycle has been completed.

Figure 6

Transitional Framework Integrating Tibetan Bardos Philosophical Concept

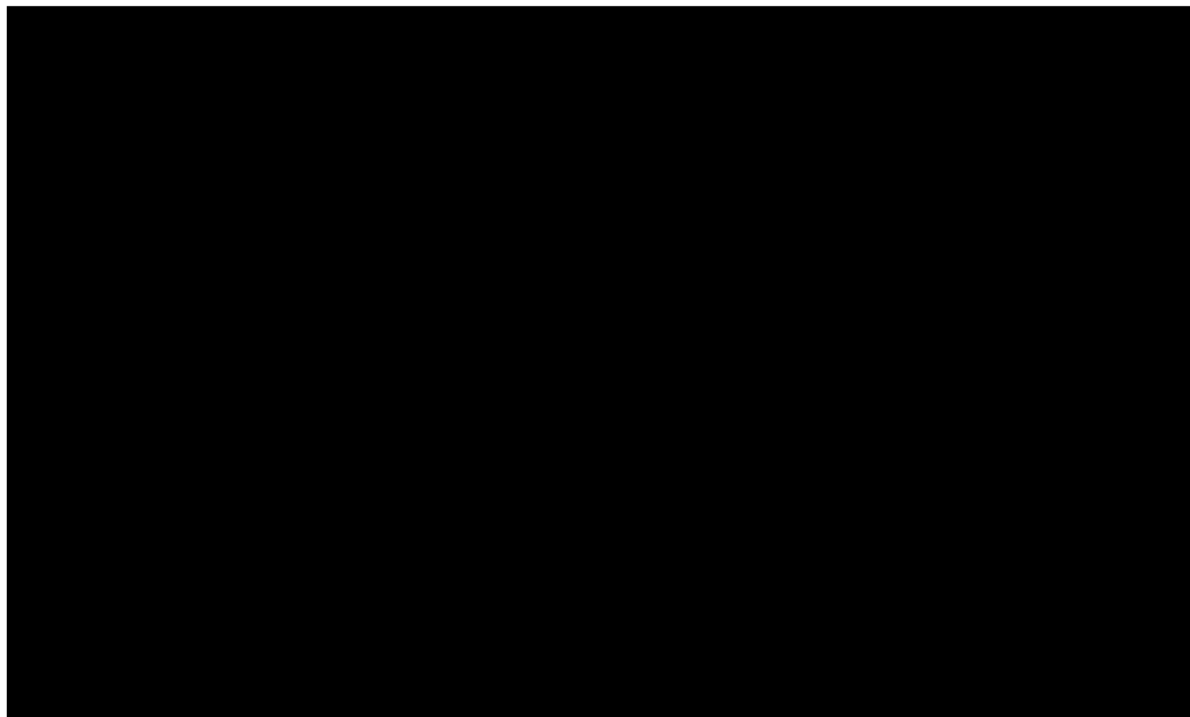


Note. Transitional Framework integrating Tibetan Bardos philosophical concept. (Hayes, 2020, p. 22)

Hayes's (2020) model identifies the growth and evolving process of stepping out of 'old ground to transcend into new'; it is an 'evolving process unfolding' (p. 21). Each phase signifies the movement or flow that a new manager or leader must do to access the new and beyond. The shifting phase dismantles and deconstructs the norm, whereas the ending phase disintegrates and dissolves the known. Thus, in phase three, the emerging flow is the reforming and reconstructing, and in phase four, forming is developing and transcending into a new form.

Figure 7

Transitional framework Cycle



Note. Transitional framework Cycle (Hayes, 2020, p. 24)

The third evolution of the transitional framework is the transitional cycle. The transitional cycle aims to understand the root cause of the challenges experienced during the transitional space. For a successful transition to occur, leaders must go through all four stages or phases of

consolidating norms, interrupting patterns, letting go, and creating new ideas (Hayes, 2020, p. 25). Firstly, the shifting phase (dismantling and deconstructing) includes identifying the norms and familiar ways of doing the job that will be interrupted. Secondly, the ending phase (disintegrating & dissolving) identifies the known practices required to let go. Thirdly, the emerging phase (reforming & reconstructing) requires identifying the capabilities and operational procedures necessary for success (Hayes, 2020, p. 25). Finally, the final phase forming identifies new approaches and practices that will be needed to be developed and implemented.

Of course, each person's experience within this cycle would be different as their experience would also be based on their personal experiences and their educational and professional background, which Hayes (2020) did not discuss. However, she states that we are continuously navigating a gravitational pull between past, present, and future experiences in all transition phases. This model, though suitable for understanding transition and has given newer insight, highlights the complexities of transitions due to the human or individuality of people and context. However, the complexities do not mean that lessons, understanding, and vision cannot be garnered, as research indicates that new leaders have learnt from using the model even with varied complexities. Hayes's (2020) framework highlights a movement and a flow that starts with transitional blindness. This is because of culture and the norm of a leader's perceptions, goals, and transition to the new role. As a result, they are often blinded through the transitional space and encounter various challenges through each phase and cycle.

New leaders and managers should understand the environment, culture, and people within the organization. They must know their allies, confederates, opposers, fence-sitters, and all the key influencers and stakeholders in their network (Watkins et al., 2014, p.3). They need to take the time to observe and learn about the new environment or new role before implementing changes. New managers/ leaders are sometimes given mandates that lead to a change or innovation in business processes (Ciampa & Dotlich, 2015; Gentry et al., 2014). According to Watkins et al., (2014), the level of change that a new leader seeks to implement can vary hugely, depending on the stage of the business (p. 3). New managers coming into a role will find that the situation is often a nuanced mix: for example, the business may be successful, but some aspects call for realignment (Watkins et al., 2014, p. 3). According to Watkins et al. (2014), it is a complex process as the consequence of not adapting to the new corporate culture is akin to what happens in living organisms when a foreign element enters. The company culture is so strong that it is

like an immune system- ignoring this and trying to impose one's modus operandi provokes an immune reaction and being ejected (p. 4).

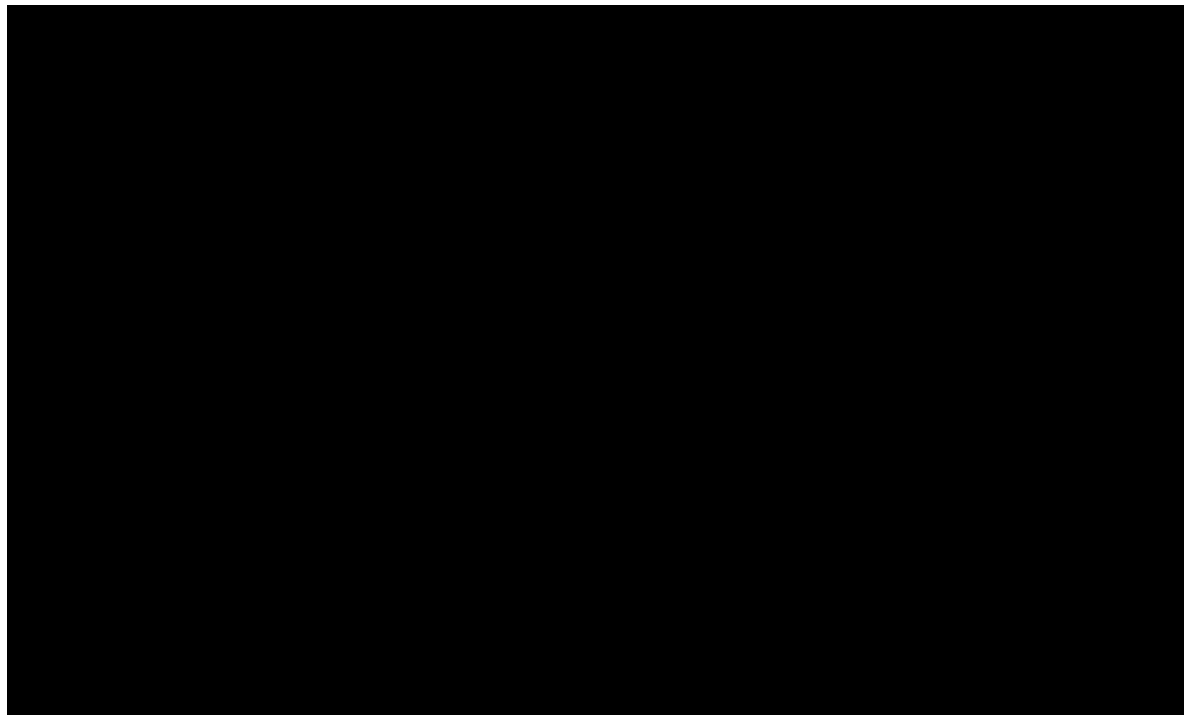
2.6 Transitional Challenges

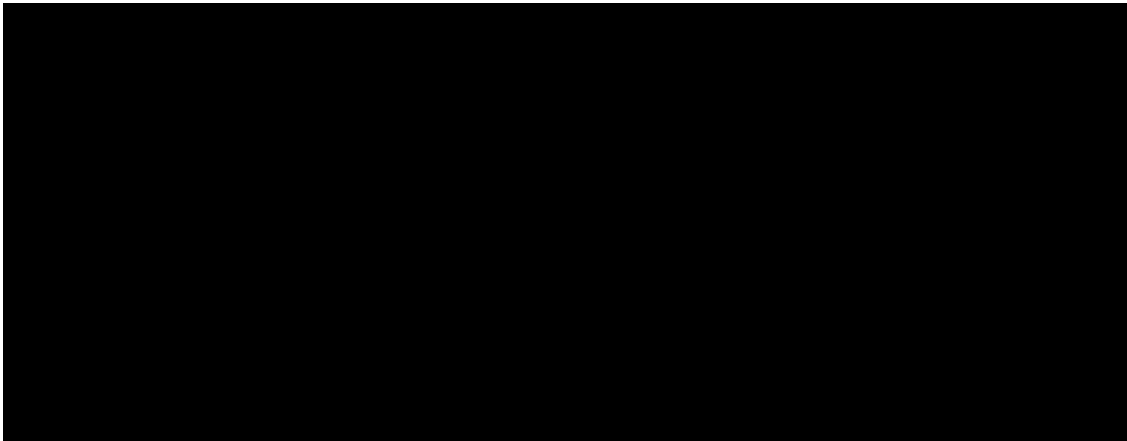
The transitional process requires strategic planning, time, and flexibility for the optimal performance of the entity or the organization (Bridges & Bridges, 2016; Fouad & Bynner, 2008). This is because the transitional period is volatile, uncertain, complex, and ambiguous (VUCA) as leaders are often unprepared, underestimate the transition and grapple with internal and external functions on the move (Hayes, 2020). Strategic planning is required as the very nature of the role and expectations can be daunting, with the thoughts of opportunities and challenges (Ocho, et al., 2020).

There are various challenges faced by new managers such as not being supported in their new leadership roles, low staff morale, lack of training, long hours, stressful job demands, and pressures from top management, as well as employees (Bushardt et al., 2018, p.10). The table below illustrates, twelve challenges that emerged by first-time managers carried out at the Center for Creative Leadership (Gentry et al., 2014, p. 1).

Table 1

The Leadership Challenges First-Time Managers





Note. The Leadership Challenges First-Time Managers (Gentry et al., 2014, p. 4)

These are just a few of the challenges faced by new managers transitioning into their roles. Ocho et al., (2020) in their quantitative research shared similar challenges and perceptions of junior staff nurses recently promoted to nurse managers, such as the inexperience of nurses in managing their human resources or associates efficiently (p. 1356). According to Pfrimmer et al., (2015), individuals should have both technical and management skills when transitioning to execute their functions effectively (p.2). However, many of those that are promoted, especially within an organization, usually demonstrate excellent technical skills which is the premise for promotion and are usually unprepared for the stressors of the new role (Ocho, et al., 2020; Pfrimmer et al., 2015). Pfrimmer et al. 2015 noted that interim nurse leaders' stressors, including role strain, isolation, leadership burden and the swift change from peer to supervisor (p.15).

Ocho et al., (2020) stated that new nurse managers are often promoted from within and must make a complete transition from being peers with colleagues on the nursing unit, seeing them socially, sharing unit stories, and the next day, she or he is a nurse manager with entirely new responsibilities and accountability for outcomes on the nursing unit (p. 1357). If one remains in the same department and assumes a supervisory role, co-workers may indeed have difficulty accepting this change in roles (Bushardt et al., 2018; Watkins et al., 2014). It is an exceedingly difficult position as 'yesterday, they may have been complaining about their boss together over their lunch break. Now, one of them is the boss, and that complaining is directed at the new boss, usually behind his or her back' (Watkins et al., 2014, p. 1). The adjustment of moving from a personal relationship, or in some cases, close friends, to now being a supervisor changes the dynamics of the friendship. Balancing being professional and personal causes anxiety,

stress, and possible tension within the work environment (Pfrimmer et al., 2015; Campbell, 2023; Gentry et al., 2014).

Gentry et al., (2014) gave suggestions on how new managers can handle moving from peers to management. They suggest setting clear boundaries with staff about the working relationship, and their friends must know who is boss, and that no preferential treatment will be given when it comes to bonuses, raises, promotions, support, and resources (p. 5). New managers should have meetings to discuss the way forward, as well as to ascertain and understand employees' motives and intentions. The transition to a managerial role from a subset of colleagues is indeed challenging, as the responsibilities are different as are the tasks of managing, directing, and delegating to past colleagues (Gentry et al., 2014; Hayes, 2020). Having an adequate support system as well as preparing staff for the internal promotion of colleagues retains talents, reduces tension, and allows for productivity.

New managers need to be productive and efficient leaders; they need to acquire or enhance management skills related to being a better leader, while still honing their craft in their job as an employee. In the research by Gentry et al (2014), a respondent stated “I was recently promoted to manager of a larger number of employees in the same department. Although I have worked in this department, there are many facets of this department that I have to learn from scratch. I want to learn all aspects of this new position without coming across as ignorant” (p. 10). This shows that ‘role’ is dynamic and requires learning and training for development and efficiency. Leading, prioritizing tasks, guiding, and exercising authority over subordinates is a challenging issue that has various elements to consider. Importantly, the ability to set and prioritize team tasks, identify where to focus efforts, and keep the team prepared and working efficiently, along with the ability to address performance issues with team members that take the team off track, are all part of this challenge (Gentry et al., 2014).

Another management transitional challenge is the difference in generational supervision. Millennials are one of the youngest generations (generation Y) currently in the workforce, born between 1980 and 1995 (Grotkamp et al., 2020, p. 58). The Millennials will follow in the footsteps of the soon-to-retire Generation X and Baby Boomers, increasingly comprising a significant number of employees within organizations across the globe (Baker Rosa & Hastings, 2018; Weldy, 2020; Grotkamp et al., 2020). The Millennial generation's work ethics and motivation are different from that of the traditional generations (Bushardt et al., 2018, p. 10). They are said to be very technologically savvy, and technology is an integral part of their

life and much academic literature is published on them (Bushardt et al., 2018, p. 10). One study described the Millennials as a generation as feeling entitled, narcissistic, self-interested, unfocused, and lazy (Bushardt, et al., 2018). Whereas Meister and Willyerd (2010) reported that the Millennial generation places a high value on teamwork, personal productivity, self-management, personally fulfilling work, and social consciousness (Bushardt et al., 2018, p. 10). From a very young age, Millennials are expected to seize every opportunity given to them, receiving grades, trophies and credentials, and pursuing leadership positions for which they have been prepared by the most prestigious universities (Hershatter & Epstein, 2010; Grotkamp et al., 2020). For Millennials, transitioning into management or leadership roles may be overwhelming. A challenge is coordinating and directing other generations with different values, strengths, and weaknesses, which may be incredibly difficult as well as rewarding (Bushardt et al., 2018, p. 14). Grotkamp et al., (2020) state their qualitative research is one of the first empirical investigations on Generation Y in leadership. Grotkamp et al., (2020) data identify key findings of Generation Y leadership (p. 66).

2.7 Transitional Adjustment

The process of Adjustment is important in transitioning and takes time. It includes various attributing factors that aid in the development of the required role. In research conducted by Moorhead (2018), discuss three dimensions of transition and adjustment from student identity to professional identity. The adjustment included excitement and nervousness that required individuals to be confident and comfortable. They noticed participants evolved and changed over time. It took six to twelve months to transition and adjust. According to Nicholson (1990) and Blair (2000), newly qualified workers must prepare (endings) for a change in role, encounter (in-between) the field, and then adjust (in-between) and become stable (new beginning) in their new life. The participants in the research encountered (in-between) professional identity by drawing on their university education and entering the field with a sense of the kind of social worker they intended to be in practice (Moorhead, 2018, p. 213). The participants emphasised the importance of having adequate time, experience, and reflection to adjust (in-between) and become more proficient in articulating and enacting professional identity, which is consistent with findings elsewhere (Campanini et al., 2012, p.33). Most reached the stage of stabilisation, having transitioned, and adjusted to their job role, professional identity, and new life as a qualified social worker (Moorhead, 2018, p. 214).

Those that are transitioning should reach out to their network of colleagues, mentors, and coaches for guidance on how to best prepare for the transition period and their new role (Granko et al., 2017, p. 559).

Information compiled from nursing research indicated that understanding the expectations of the job, orientation and mentorship are successful steps in the process of transition (Mower, 2017; Suplee, 2009; Ocho et al., 2020). An important step highlighted by Mower (2017) is the understanding of the job requirements which are outlined in the job description (p. 111). A review of qualifications outlined in the job description should be reviewed with current expertise and experience before application or approval of the position (Mower, 2017, p. 111). In the article by Ocho et al., (2020), a problem identified was that the nurses promoted in the Caribbean islands were young and may have lacked seniority and inexperience, which caused transition problems. An interesting finding was the importance of experience, qualification, and the criteria for the selection of nurses for promotion. The criteria for the promotion of employees are critical, as it provides standards for evaluation, and allows for succession planning. Therefore, an effective orientation program and succession planning help the transition process. Orientation helps nurses to become familiar with the system in which they will be working and provides opportunities for building skills, integrating into the academic culture, networking, and mentorship (Suplee, 2009, p. 514). Orientation provides opportunities and should provide mentorship for the integration of work and culture (Mower, 2017; Suplee, 2009).

A good mentor is chosen based on his or her ability to guide and support the mentee. A mentor becomes even more valuable if there are no materials, resources, or information provided (Mower, 2017, p. 113). Ocho et al., (2020) findings stated that nurses who were trained and had their predecessors or even mentors assist in their preparation found that they were still inadequately prepared for the position. Ocho et al., (2020) in their research found that nurses were prepared for their managerial role through acting or limited training. However, they concluded that a support system is essential for success in transitioning. Mentorship, however, they stated, is a key part of training and development, and is an effective strategy for the transference of core competencies among nurses transitioning into positions of leadership (p. 1361).

Ocho et al., (2020) stated that the successful transitioning of junior staff to nursing managers is dependent on ‘providing opportunities for advanced preparation, mentorship, and succession

planning’ (p. 1360). The absence of strategic planning and foresight causes the ineffectiveness of managers in their new roles. The manager who identifies a potential successor should make available opportunities for professional development to assist with ease of transition into positions of authority (Ocho et al., 2020, p. 1361). This also highlights the importance of professional development for advancement or social mobility in occupation. Key in the transition in any role is the initiative by management to invest in its staff to grow and develop. Managers must not just be willing to invest in themselves, but in the potential successors who can be prepared to assume greater levels of responsibility within the organization (Ocho et al., 2020, p. 1361) and should recognize the greater good for the organization. Suplee (2009) stated that mentors provide support, offer the “insider’s view”, share wisdom, answer questions, assist in problem-solving, direct their colleagues to authoritative sources of information and facilitate networking (p. 517). The recommendation made by Suplee (2009) is that mentorship is provided during the early stage of transition (p. 517).

2.8 Principals’ Transitional Experience

Principals or Administrators have an enormous and overwhelming task, and in most cases upon appointment, are unable to navigate their task efficiently and effectively (Hargreaves et al., 2003; Spillance & Lee, 2014). It is a major shift from teacher to principal that changes perspective, expectations, workload, and social relations (Miller, 2015; Spillance & Lee, 2014). As a result, “potential principals often hesitate to apply, because of overburdened roles, insufficient preparation and training, limited career prospects, and inadequate support and rewards” (Pont et al., 2008, p. 2). Principals are often not adequately prepared for the position; they are (teachers) professionals becoming managers, and some are unaware of the complexities and the nature of the job.

For novice principals, the challenges are great: for example, understanding what it means to lead the school, and what needs to be changed to bring about improvements (Daresh & Arrowsmith, 2020 (Spillance & Lee, 2014)). Novice principals are often frustrated by the large volume of administrative tasks, which limits their ability to get inside the classroom and perform the duties that are expected of them as ‘instructional leaders’ (Spillance & Lee, 2014, p. 436). Research has reported that novice principals had trouble in some areas of school administration, such as leading and managing staff, professional knowledge, use of resources, self-efficacy, school-community relations, and issues related to the system they act in, leading learning processes in school (Beycioglu & Wildy, 2015). New or novice principals also

struggle with feelings of professional isolation and loneliness, as they transition into a role that carries ultimate responsibility and decision-making powers (Spillance & Lee, 2014, p. 433). Spillance & Lee (2014) outlined other transitional challenges experienced by new principals such as managing the budget, implementing new government initiatives, and ineffective and resistant staff members. Resistance to routines and culture changes, by staff, occurs due to the new principal being compared to the previous principal as well as the perception of threat to the current way of life by said staff. (Spillance & Lee, 2014)

In Turkey, the Turkish government realized that their principals were not prepared for the position (Beycioglu & Wildy, 2015, p. 310). As a result, the constant review of essential requirements needed for the principal's position has taken place over the years. In Turkey, teaching experience had been the basic requirement for principalship and learning to be a principal was done on the job (Beycioglu & Wildy, 2015, p. 311). However, through careful analysis and evaluation, the Turkish government implemented a series of changes throughout the years and required principals to not only have training as a teacher but a degree in education administration (Beycioglu & Wildy, 2015, p. 311). Later years require a postgraduate degree in education administration and training provided by the ministry for the effectiveness of the post.

The topics covered in the educational administration programs to prepare principal are public administration; educational administration; school management; democracy and human rights; organizational change and innovation; teamwork; school-environment relations; social interaction and communication; personnel management; total quality management; teaching and instruction; and school laws and regulations (Beycioglu & Wildy, 2015, p.312). The research from Turkey and the Turkish government has forty years of principal preparation provision through constant development and implementation of policies suggesting that principal preparation is necessary; the preparation process is complex, and the early years of appointment have a myriad of challenges for newly appointed principals. The recruitment process of principals is challenging, as the Turkish government has tried to make the appointment process easy by implementing strict requirements. However, a range of factors such as legal, institutional, socio-cultural, task or role-related, personality and experience-related, and others invisible, have made an appointment with the principal difficult (Miller, 2015; Miller, 2014).

In the research by Beycioglu and Wildly (2015), the principals valued the preparation given; however, they realized that the transition from teaching to principal is a significant step. The transition may be termed as a shock to some and requires a bridge to fill the gap in transitioning. The research also highlighted that novice principals and assistant principals (with twenty years of experience) both felt that they were inadequately prepared for principalship upon appointment. Spillance & Lee (2014) in their research stated that novice principals had to figure out practice while on the job through their interactions with various internal and external stakeholders (p. 453). The reasons for this require more research within the Turkish context, but this, however, highlights the magnitude and difficulty of the role.

The shock and difficulty of the role have been discussed in research by Spillance & Lee (2014). The findings indicated that a major “reality shock” for novice principals was the ultimate responsibility of the role. It is key to recognize before delving into the findings of the research that the experiences may be different because of social conditions, school context, previous experience, and school environment. Different transition situations meant that principals faced different social conditions when they assumed the principal position, and these varied conditions either eased or exacerbated the practice problems they encountered (Spillance & Lee, 2014, p. 453). Most of the participants expressed their shock at the responsibilities or workload of the position. The position required the ultimate accountability and responsibility of the principal. The role of the principal is multifaceted with greater responsibility and greater commitment (Spillance & Lee, 2014, p. 443). There are various roles that the principals are expected to perform: “You are the instructional leader and that’s the main thing but also a social worker when someone needs some shoulder to cry on or some help. . . . I am an engineer . . . If parents come in with issues that they have going on at home and they want to know if they should call the police, and so now I’m a lawyer. . . . You’re expected to be everything to everybody” (Spillance & Lee, 2014, p. 450). Principals are expected to have answers for all issues and are the ultimate decision-makers. Novice principals stated that the diversity of the role and the unpredictability of the position may be overwhelming. The position at times is isolating because principals at times would have to make difficult decisions that may not be acceptable to stakeholders (Spillance & Lee, 2014, p. 446). The principals' research sense of ultimate responsibility came with increased stress, and the inability to leave the job behind at the end of the workday or even at weekends.

Spillance & Lee (2014) recommended that school entities should develop strategies for succession planning, leadership programme and the appointment of business managers to assist

with the difficulty and shock of transition (p.446). Hargreaves et al., (2003) argue that “incoming principals may be viewed as threats to comfortable school culture, or as saviours of toxic ones. Whatever the response, leadership succession events are rarely treated with indifference they are crucial to the ongoing success of the school” (p. 4). According to Hargreaves et al., (2003), a successful and smooth transition for principalship is a principal that is groomed, an insider and with a supported culture (p. 21).

2.9 Continuing Professional Development (CPD): What is it?

Friedman (2012) states that just because someone has a certificate to show they are a professional does not automatically mean they are competent and trustworthy. “They may have been up to date the day they qualified, but who is to say that 10, 20, even forty years later that individual is still up-to-date and has expected range of competencies” (p. 10). The view of qualification is the requirement or the only requirement for professional development has changed since the 1960s due to deficiencies in learning and inadequate service (Friedman, 2012, p. 11). The changes and concern for professionalism and professional bodies in terms of accuracy, and competency stimulated the rise of CPD in the 1970s (Friedman, 2012; Faure, et al., 1972).

The 21st-century workforce requires more than just qualification because of continuous changes in the work environment, such as globalization and technology. Many organizations and professional bodies require Continuing Professional Development or Continuing Professional Education (CPE) to ensure global competition, competence, trustworthiness, efficiency, development, and customer satisfaction. CPD is a lifelong, consistent process of enhancement of knowledge, expertise, competence, and reflection on career experiences. In essence, CPD is the personal or corporate development by enhancing knowledge and/or skills (Friedman, 2012; Megginson & Whitaker, 2010). Generally, when people use the term “continuous professional development”, they usually mean a formal process such as a conference, seminar, or workshop; collaborative learning among members of a work team; or a course at a college or university (Golden et al., 2015, p. 27). These learning activities may be done through periodic training, seminars, or courses that are formal or informal structures.

The initiative of CPD may be personal or corporate; for the individual, CPD provides the opportunity to ‘soar like an eagle or helicopter’, to examine career opportunities from a wider perspective, and it challenges the individual to make time for regular personal reflections and reviews (Megginson & Whitaker, 2010, p. 3). CPD improves not only professionalism but also

personal development, which contributes to personal growth and development. According to Friedman (2012), personal development can be an essential support for the trustworthiness of professionals; encouraging self-confidence, awareness of ethical pitfalls and openness to new ways of doing things, which is the ‘reprofessionalization’ of the individual in practice and personal life (p. 13). Personal CPD focuses on individual needs and aspirations, which motivates and increases morale, thereby increasing performance. Corporate CPD is done by employers or government bodies for succession planning, retaining staff, motivating staff, and developing skills and knowledge so that employees can compete within the sector or industry. This process is intentional, ongoing, and systematic and is guided by a clear vision and purpose for professional development (Guskey, 2000, p. 4).

The concept of professional development is synonymous with the concept of Continuing Professional Development. Continuing Professional Development (CPD) is used to ensure improvement and development in one’s profession as it is a tool used for professional development. Professional development, in a broad sense, refers to the development of a person in his or her personal role by the gaining and increasing of skills and knowledge among professionals (Chikari et al., 2015, p. 26) Professional development is a reflective process by employees or employers of their practice, whether voluntary or involuntary, that consists of all-natural learning experiences and those conscious and planned activities that are intended to be of direct or indirect benefit to the individual or group (Day, 1999, p. 4).

Day (1999) argues that the reflection of practice is necessary for career development as this leads to changes that may be radical or transformational. Although his context of thought applies to teachers, it may be applied to other professions. It is generally agreed that reflection in, on and about practice is essential to the building, maintaining, and further development of the practice of an individual to act professionally throughout one’s career (Day, 1999, p.5). Reflective practice is a component of CPD and is essential for the improvement and transformation of practice. CPD should cause a transformation of learning, that ‘induces a more far-reaching change in the learner than other kinds of learning, especially learning experiences, which shape the learner and produce a significant impact or paradigm shift, which affects the learner's subsequent experiences’ (Olena, 2018).

According to Day (1999), reflection involves the participant in a critique of practice, the values which are implicit in that practice, the personal, social, institutional, and broad policy contexts in which practice takes place, and the implications of these for improvements of that practice.

Theoretically and in its simplicity, CPD makes sense and ultimately provides changes or improvements to practice; however, there are indeed various elements, features and characteristics that must be implemented to ensure an effective CPD. No one CPD or professional development plan fits all professions, however, there is indeed a cycle process that is an effective guide.

Many are of the view that professional development programs are uninteresting, ineffective, and a waste of time. “Many participate in professional development primarily because of contractual obligations but often it is something they must ‘get out of the way’ so that they can get back to the important work” (Guskey, 2000). Oftentimes, professionals simply have no interest in these programs, and often CPD is the first to be cut from the budget due to budgetary constraints. The reason for such a view is that these seminars, workshops, or training are not well planned, not focused on present issues, impractical, and not based on adequate research. However, there are professional development programs or CPD programs that yield positive outcomes and improvements. The various research by O’Sullivan on the health sector truly echoes the views of Guskey (2000) that at the core of each successful professional development, effort is a thoroughly conceived, well-designed, and well-supported professional development component. CPD enhances knowledge and skills, thereby increasing outcomes in various sectors. This requires that all stakeholders be committed to CPD and its purpose. In addition, it should be reiterated that a successful professional development outcome depends on a thoughtfully planned and well-implemented plan (Guskey & Yoon, 2009; Moss et al., 1994).

The effectiveness of professional development or continuous professional development practice varies depending on the author, research, and professional entity. The features of CPD vary based on research, however, some elements are common such as reflection, proper planning based on research, it should be meaningful, and evaluation should take place at the end of CPD. CPD effectiveness depends on the contextual situation based on input and output. It is very clear that professional development programs and CPD can be very effective over time and is indeed measurable, but there are limited scientific defensible criteria that may be used or generalized (Guskey, 2000; Guskey & Yoon, 2009).

2.9.0 Principal Professional Development: Why?

CPD in education is a term employed to explain all the interventions in which teachers involve themselves during their careers (Dilshad et al., 2019, p. 119). Burns and Lawrie (2015) also

put forward that for teachers to be effective, they must undergo a lifelong CPD experience, as it is necessary for keeping them up to date with the daily requirements of their profession as a teacher (Evers et al., 2016; Derakhshan et al., 2020). Effective professional development programmes engage teachers in learning events which are comparable to those they may employ with their pupils and inspire them to create teachers' learning forums (Dilshad et al., 2019, p. 119). In Moss et al., (1994) research they implore lifelong learners to take charge of their development. They identified ways in which teachers reflect, through their autobiographies and action research, to develop their practice. The autobiographical sketch and action research allow teachers to reflect on past experiences, make connections, and better understand what they are doing and seek solutions for future classroom situations (Moss et al., 1994).

Often, principals are neglected in professional development programs, as they are not perceived as directly influencing student learning. Continuing professional development of teachers is generally focused on student outcomes or the improvement of teachers' knowledge, skills, and instructional practices and rarely invested in the teacher's career advancement (Garet et al., 2001, p. 925). These skills are usually developed informally or left undeveloped which leads to inefficiencies in schools. Coupled with limited professional development programs for the transition of these positions, some persons may not be suitable for the position (Miller, 2015; Miller, 2014). Unlike that of the United States and European countries, there are many school systems (Jamaica) that are like that of South Africa where educators can be appointed to the office of principalship, irrespective of the fact that he/she had school management or leadership qualification (Mathibe, 2007, p. 529).

Huber (2004) states that principals are not only expected to create the internal conditions necessary for continuous development and increasing professionalization of their teachers, but they are expected to continually develop in their profession. As a result, there are many initiatives for educational reforms; one such reform is the professional development of principals, thereby improving competencies and skills. According to Arhipova and Kokina (2017), in the last decade, there has been a rapid increase in the demand for the upgrading or higher educational attainment and qualification of school principals (p. 8). The professional development of principals is as essential and crucial as that of the teacher. The principal influences student learning through their interactions with teachers regarding their learning and

through their leadership in the implementation of policies that affect the students (Wright & Jose, 2016; Hallinger & Heck, 2010).

Efficient and effective schools need effective leaders that use and demonstrate effective approaches. This means there is a need for the preparation of teachers for principals, or programs for new and future principals and the development of the skills of principals that are within the system. However, some believe that principal preparation programs (PPP) for new principals have largely failed to keep pace with the current complex realities of what is expected from this vital leadership position (Cassavant & Cherkowski, 2001, p. 72). It, therefore, means that there is a need for continual professional development of principals to deal with the daily realities and changes of the job. The continual organizational or structural changes in education by governments globally have caused an organizational culture shift in which principals are expected to function (Bush, 2008; Beycioglu & Wildy, 2015). Principals are usually prepared for their role through formal education that is theoretically based, and where general management principles and administrative lessons are taught in short courses. The learning activities are institutionally defined and generally not tailored to the specific learning needs of principals or reflective of their specific school context (Arhipova & Kokina, 2017, p. 11). Therefore, the principal is unable to effectively carry out his/ her duties and requires workshops, seminars, training, mentoring, and professional learning communities to implement the theoretical into practical. The process of producing an effective principal should be sustained by continuous learning and skills development (Mathibe, 2007, p. 528).

CPD is essential of course for school development, the effective carrying out of principalship duties, and to assist new principals to transition into their new roles. CPD also enhances the level of interest in principalship among prospective principal candidates (Cassavant & Cherkowski, 2001). Due to the overwhelming task of the job description of the principal, many are hesitant to take up the post. However, with effective and continuous CPD, individuals will be motivated and prepared to become principals. CPD will enhance the knowledge and the skills of the principal by developing self-awareness, systemic thinking, creativity, models for solving complex problems, new techniques to deal with day-to-day problems, knowledge about testing and assessment of student learning, financing of public education and staff development as the capacities most needed for effective leadership (Oplatka, 2018, p. 131).

The 21st-century principalship requires creative methods or a combination of methods of professional development tools to meet the complexities of the position. Mathibe (2007) states that the model for the professionalization of principalship may encompass a variety of programmes, such as training and networking (p.524). The use of formative methods of professional development is essential and is still necessary such as face-to-face workshop training and seminars. But principalship requires networking, collective inquiry, and reflective practice to enhance the productivity of principals (Thessin, 2021). However, there should be a needs assessment that is done to ensure that the required needs of the principals are met based on context and situation. For instance, successful professional development requires insightfully designed structures (mission, curriculum, instructional approaches) and value-driven cultural elements (Peterson, 2002).

The networking of principals is keen for the development of skills through professional communities, coaching, and mentoring. This is helpful as often principals find themselves anxious, frustrated, lacking confidence and isolated in the school environment (Cassavant & Cherkowski, 2001; Wright & Jose, 2016; Mathibe, 2007). According to Cassavant & Cherkowski (2001), one effective networking strategy for improving school leadership is mentoring. Mentoring is not a new phenomenon; it is a continuous process that involves collaboration through peer sharing and peer support (p. 74). However, this method of development seems to be informal and not strategically planned. A mentor is a more experienced person who can lead, help, and guide a less experienced person in his or her professional development (Cassavant & Cherkowski, 2001, p. 75). This does not suggest that the individual is an expert in the field. A mentor has simply been in the field for several years; it does not affirm the fact that they are competent in the field. Mentoring may be an effective strategy for improving school leadership based on context. However, mentoring may not be accepted by some as it is usually informal, has no specific focus or assessment, and does not promote reflective inquiry or craft models, which are a few components of professional development. There are formal mentoring programs for principals that have yielded success in European countries and areas of the United States (Cassavant & Cherkowski, 2001, p. 75).

There are various benefits as there are limits to mentoring- one benefit is that the mentor relationship establishes a wider collegial network, improves principalship skills, gains in self-confidence, attains a higher level of professional knowledge, and improves job competence (Cassavant & Cherkowski, 2001, p. 76). Professional development should include some form

of networking, whether it be coaching, mentoring, or professional communities. The collaboration of principals allows for team building, the fostering of professional communities and the reflection of practice. The benefits of collaboration included an increased awareness of differing needs, contexts, and issues within their context (Cassavant & Cherkowski, 2001, p. 76).

2.9.1 Literature Review: Overview and Conclusion

The literature review starts with an overview of the definition of transition. The transitional process is explained as moving from one technical/professional role to a management role. The transition process is not simple, but varied internal and external factors impact it. Hayes (2020) describes the process as ‘complex, ambiguous and messy.’ The complexity of the process includes a period of adaption and adjustment to culture or a change of culture. A distinction between change and transition is made; however, the processes are intertwined. Those transitioning must understand the process, and the changes, along with known and unknown factors.

There are various scholarly transitional models presented in literary sources. Two transitional frameworks or models- William Bridges (2016) and Hayes (2020)- are presented and examined. William Bridges (1991) sets the transitional process framework and Hayes’s (2020) four stages are shifting, ending, emerging, and forming. The framework includes the process of removing the professional identity and creating and adjusting to a new role. The forming of the new identity is different and is affected by social, economic, and cultural factors.

The challenges of transition are examined primarily from the health industry, as more sources were available. There are various challenges that professionals moving into a managerial position encounter, such as resistance to employee relations, cultural adjustment, socialization, role identity, policies, learning procedures, and generation management, among others. Role identification is essential during role transition and may cause changes in career roles and self-definition. The growth of work-related functions is fostered by the experiences of past and present occupations. It is a process that moulds self, through occupational/ professional identification and not the designed roles, but the experiences.

The challenges of senior teachers or principals are also outlined in this chapter. School administrators experience similar managerial challenges; however, few challenges are specific to the sector. “Potential principals often hesitate to apply because of overburdened roles,

insufficient preparation and training, limited career prospects and inadequate support and rewards (Pont, Nusche, & Moorman, 2008, p. 2). Difficulty experienced by school administrators also includes leading and managing staff, professional knowledge, use of resources, self-efficacy, school-community relations, and issues related to the system they act in, leading learning processes in school (Beycioglu & Wildy, 2015). Leaders must be given adequate support during the transitional process that will assist in the adjustment process. The adjustment process includes former knowledge and experience, as this is key for the role. However, other support consists of a succession plan, mentoring, networking, training, and orientation.

Continual Professional Development for personal and professional development is the last section of the literature review. Firstly, the benefits of personal and professional development are explored. Secondly, the tenets and the complexity of Continual Professional Development are established and examined by various scholars. Finally, how Continual Professional Development is beneficial for improving school results and principal development is reviewed.

The integration of a technical role and a professional role outlines challenges that have been experienced from the literature within the health sector, business arena, and education. Those transitioning must understand the process, as this minimizes environmental, cultural, or physical shocks that may be encountered. The literature suggests that unpreparedness and understanding of the transitional process is the main reason for failure by leaders or managers. The Turkish report and principals' experiences indicated various challenges experienced, due to a lack of preparation for the transitional process, and their responsibilities and duties. Continual Professional Development is a key factor in professionalism, personal development, corporate development, and reflection of practice. This informed knowledge develops a need to explore the experiences of Jamaican teachers transitioning into roles of leadership and management. This justifies exploring the transitional experiences to identify the challenges and develop guides to navigate the challenges.

Following the literary sources and information provided the focal point, scope and direction of this research are guided by the following research aim, objectives, and questions. Though there is varying literature on transition, the challenges, and experiences there is limited information on transitions of educators to principalship in the Caribbean. Similarly, there is no detailed research on the transitional process of educators to principalship in Jamaica. These studies focus on the external problems with school leadership but not the possible root cause. There

are areas of research on role identity and career development that can help in decision-making for school administrators/leaders/ principals/ policy makers. However, none addresses the experiences, culture, educational history, and socialization of educators in Jamaica that help in the forming of occupational identity. A gap lies in the literature that would connect to the experience and culture of the Jamaican people of whether their experience, challenges and perception of the transitional process are different from other studies conducted and the possible recommendations. This research seeks to address the literature gaps identified by the following research aim, objectives, and questions:

Research Aim:

This research aims to explore the perception and challenges of educators as they transition into managerial roles within their institutions.

Research Objectives:

To achieve the aim of this research, the following four (4) objectives have been identified:

- Critically access current literature to ascertain the effectiveness and impact of hybrid management and identify significant themes and strategies of role transitioning that will improve process and sector.
- Explore and explain the experiences, perceptions, and challenges faced by educators who have transitioned into managerial roles.
- Examine how these educators navigate career development while shaping professional and occupational identity.
- Develop guidelines for educators who are transitioning into management that would create a conducive, efficient, and effective work environment.

Research Questions

- What are the experiences and perceptions faced by educators who are transitioning into management positions?
- What challenges did educators face during the transition period, and what are strategies used to function proficiently in the new roles?
- How do educators handle career development while modelling professional and occupational identity?

- What are the key solutions and recommendations for educators transitioning into managerial roles?

3. Methodology

3.1 Introduction

This chapter provides an account of the research design and methods used in the development and implementation of the research. It aims to clarify the research process and approaches used, the rationale, and justification for the choices made. The chapter begins with the research aim and research questions. Following this, it introduces the research paradigms and then moves into explaining and justifying the interpretivist phenomenological approach. The chapter continues with a reflection on the ethical considerations, the pilot research results, the sampling method, and the procedures used. Finally, the data analysis approaches and techniques are discussed before concluding the chapter with a realistic view of the quality and trustworthiness of the research.

3.1.0. Research Aim

This research aims to explore the perceptions and challenges of educators as they transition into managerial roles within their institutions.

3.1.1 Research Questions

- What are the experiences and perceptions faced by educators who are transitioning into management positions?
- What challenges did educators face during the transition period, and what are strategies used to function proficiently in the new roles?
- How do educators handle career development while modelling professional and occupational identity?
- What are the key solutions and recommendations for educators transitioning into managerial roles?

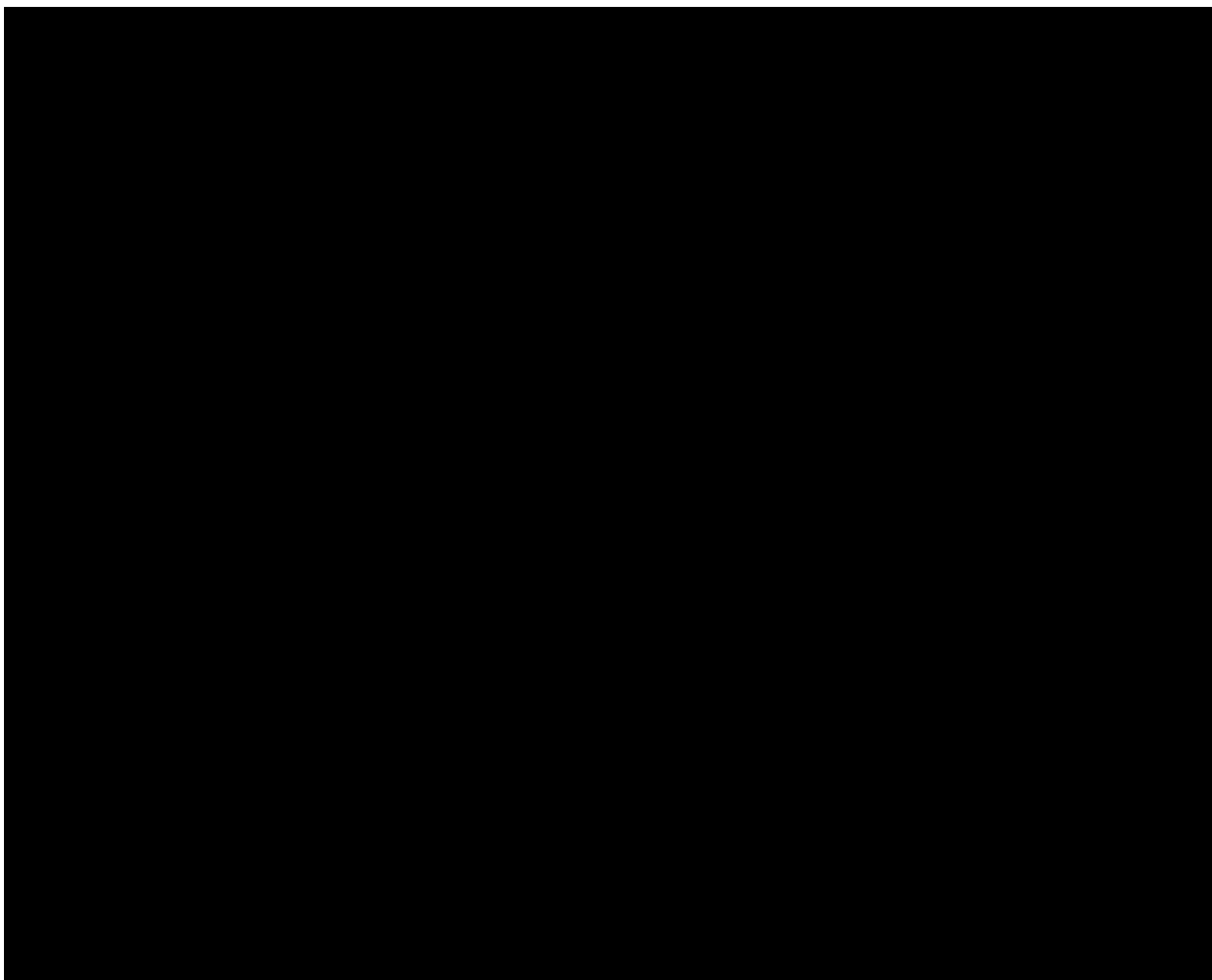
3.1.2 Research Approach

This research is guided by the three philosophical underpinnings: epistemology, ontology, and axiology. Few researchers and authors begin their human inquiry with epistemology, then ontology, or vice versa, as is preferred and acceptable. Grix (2019) states that ontology and epistemology are considered critical foundations upon which research is built. These concepts differ in meaning and are sometimes intertwined, or epistemology is discussed first depending on the research or scholar. The logical progression of this research “ontology logically precedes

epistemology which logically precedes methodology” (Grix, 2019, p. 58). The choice of methodology is influenced by the ontology and epistemology of the study. It is important to have an understanding of the ontological and epistemological position, as this inevitably influences the research process and evaluation (Bryman & Bell, 2015, p. 28). The table below summarizes the ontological, epistemological, and methodological differences between positivism and interpretivism to give a comparative outline and understanding of the decisions taken for the research.

Table 2

Ontologies, Epistemologies and Methodologies



Ontologies, Epistemologies and Methodologies (Ling & Peter, 2017; Creswell J. W., 2013)

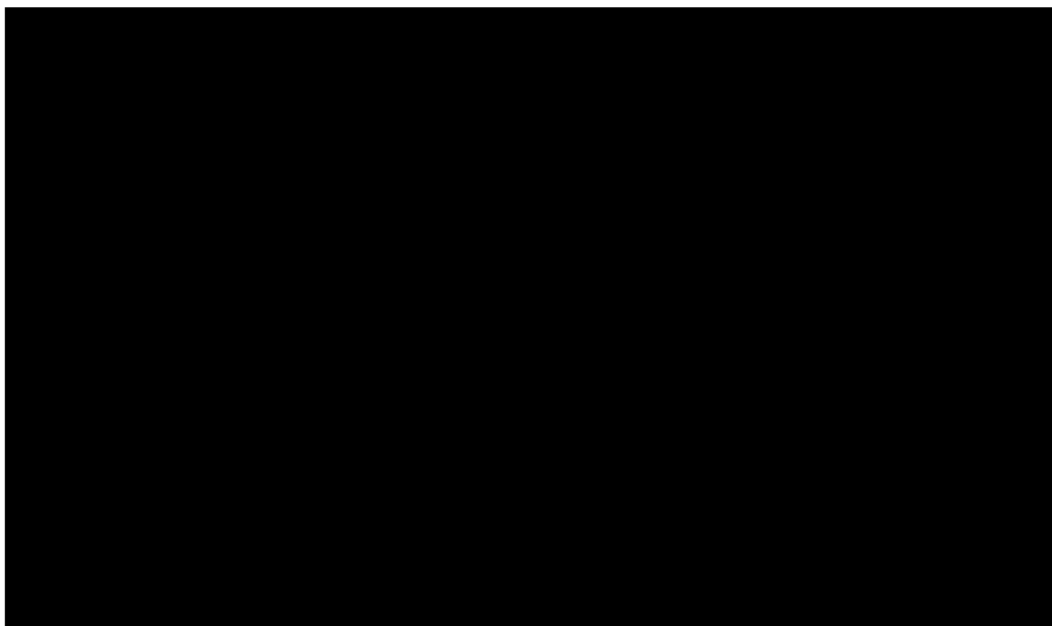
3.2 Ontology

Ontology is defined as the research of being, (Crotty, 2015,) and is based on the nature of reality; it relates to being, of what is, to what exists (Sauders, et al., 2008). Ontology is a system

of belief that reflects an individual's interpretation of what constitutes a fact (Dudovskiy, 2016, p.35). It is one's ontological position or perspective that has formulated the social inquiry of the transition of educators. It is important to note that all research starts from a person's view of the world, which is shaped by the experiences of the research process (Grix, 2019, p. 59). It is the ontological position of the researcher that must initiate the investigation of what exists and needs to be learnt. Figure 8 depicts the interrelationship of the research and the areas to be identified in each the flow of the processes.

Figure 1

The Interrelationship Building Blocks Of Research Grix



Note. The interrelationship Building Blocks of Research Grix (2002) adapted the figure from Hay (2002)

The interpretivist stresses the meaningful nature of people's character and participation in social and cultural life forms in society. The interpretivist ontological view is that there are multiple realities, and they believe that experiences and perceptions help to construct reality. Reality is therefore neither constant nor constrained by rules, as the objectivists or positivists state. The ontological assumption of interpretivism is that social reality is seen by multiple people. These multiple people interpret events differently, leaving multiple perspectives of an incident (Bryman & Bell, 2015).

The Positivist ontological view describes reality as being 'out there,' a single, objective world, which can be measured and explained with prescribed tools (Lee & Lings, 2008; Carson et al.,

2011). However, positivists have not considered that reality exists within different social actors, and is impacted by, or affected by other elements. Therefore, the researcher must examine the prescribed reality that is formed by various social phenomena. The positivist's ontological view will limit the outcome of this research, as it detaches itself from the research, and believes that personal experience is not value-free (Carson et. al., 2011). Moreover, this perspective eliminates the existence of multiple realities and focuses on a single prescribed reality. Finally, the positivist seeks objectivity and uses rational and logical approaches that this research cannot use.

This research follows an interpretative ontological view to understand and explain the educator's experiences during the transition into leadership roles. The researcher aims to explain some of the multiple realities of the transitional process through individual experiences and interpret these social realities through the voices of the different respondents.

3.3 Epistemology

Epistemology is defined as “what is the nature of the relationship between the knower or would-be knower and what can be known”? Essentially, epistemology is “how we know what we know,”; the known is identified by realities. Sources of knowledge that are possible, adequate, acceptable, and legitimate, are epistemology (Crotty, 2015; Dudovskiy, 2016). Epistemology expresses how knowledge is derived: that which is studied, and the meaning(s) attached to the studied phenomena. In essence, epistemology is concerned with “what do we accept as valid knowledge?” and “general sets of assumptions about the best ways of inquiring into the nature of the world” (Collis & Hussey, 2009; Easterby-Smith et al., 2008).

Epistemology and ontology are mutually dependent. According to Crotty (2015), “to talk about the construction of meaning is to talk of the construction of a meaningful reality” (p. 9). Epistemology aims to generate or construct knowledge within context and time. Knowledge is unable to be separated from its phenomena and context. The ontological position determines the start of the research, and the epistemological perspective identifies the process and strategies to garner the knowledge (Crotty, 2015).

The epistemological stance in research underlines the entire research process and governs the theoretical perspective of this research. The two main theoretical perspectives, rationalism (positivists) and empiricism (interpretivism) differ on the epistemological viewpoint. Empiricism accepts personal experiences associated with observation, feelings, and senses as

a valid source of knowledge (Crotty, 2015). In contrast, rationalism relies on empirical findings gained through valid and reliable measures as a source of knowledge (Dudovskiy, 2016, p. 33). Positivists view epistemology as a natural science model used to research society (Dudovskiy, 2016, p. 43). This is the acceptable and objective means for credible data or knowledge. On the other hand, interpretivists believe that knowledge is based on experiences, concepts, and meanings, and differs from the natural sciences (positivists) (Bryman & Bell, 2015). Therefore, the research of the social world requires a different logic of research procedure, one that reflects the distinctiveness of humans against the natural order (Bryman & Bell, 2015, p. 29). The epistemological perspective of this research follows interpretivists' view that the knowledge gained for this research would be acquired through personal experiences. This epistemological framework uncovers the hidden truth and hidden knowledge and constructs new knowledge. The collection of data, interpretation, and analysis would create new knowledge from sources that require interpretation. The ontological and epistemological perspectives determine the course of the research (Hussey & Hussey, 1997; Crotty, 2015).

The nature of this research is developed using an axiological framework. Axiology is a branch of philosophy that studies judgements about the value (Sauders et al., 2008). The axiological framework is essential for all philosophical research perspectives, from the positivists to the radical structuralists. It influences and guides the research process through the ontological, epistemological, and methodological approaches. Value inquiry should prioritise ontology and epistemology; it should be explicitly discussed and critically explored in research (Given, 2008; Guba & Lincoln, 2005). Values are foundational for knowledge-producing systems and should be identified in research (Hill, 1984, p. 67). The values of the researcher are essential and should be closely examined, recognised, and used. These values provide the researcher with a clear view of the research and the steps forward. The values of an interpretivist researcher influence, interest in the topic formulate aims, goals, and assumptions, however this provides an opportunity for 'objective' research design and interpretation of data that may be scrutinized, and limits its bias (Rees et al., 2023). Figure, 9, shows the axiological assumptions and the development of the research.

Figure 2

Research Paradigm



Note. The Research paradigm shows the impact of axiology adopted from Muhittin & Ossama (2015).

The axiological perspective is twofold; it clarifies the research and recognizes the possible impact the researcher's values may have on the research (Wilson, 2014). For example, the researcher's subjective or objective values select the research topic to provide a productive and happier workforce or create fairness (Rees et al., 2023). The researcher examines or investigates the reality of the phenomena being studied to construct knowledge that forms a theory or tests a model or theory.

The positivist believes that the researcher's values should be contained, and the research should be value-free. They believe that the interferences of one's values in the analysis will contaminate the results (Scott & Laurie, 2017). The positivists should recognize that although their methodology may differ from the interpretivists, their values are incorporated by choice of the research selected, the methods used, the analysis, and the language used in their conclusion and recommendations (Bryman & Bell, 2015). Whereas positivists may have a valid claim that one's values contaminate the results, they should recognize that values are embedded in their research and the meta-scientific reality (Bryman & Bell, 2015). The nature of this research cannot be done as an experiment in a laboratory. It deals with social phenomena within the education sector and the respondents' experiences and perspectives that require interpretation of the various social factors and elements that cannot be tested.

The ethical perspective of this research follows an emancipatory axiology. An emancipatory axiology provides a fresh outlook on the issues faced by educators who have transitioned into leadership and management roles (Hill, 1984). The researcher aims to understand and express the experiences of those who have transitioned into new positions. Analysing the respondent's perspectives, and challenges within its context, and identifying patterns will provide valuable insights (Smith et al., 2012). Following an interpretivist perspective, this research seeks to contribute to theory by sensitizing educators to these patterns and providing recommendations. This would provide new knowledge or outlooks to enhance the quality of educational leaders, and, as a result, improve the school system. This hidden truth is only examined by examining the reality of the educational sector.

The researcher agrees with Bryman and Bell (2015) that it is impossible to keep the researcher's values totally in check or absent (p. 40). This research is influenced by the researcher's occupation, organizational involvement, and personal values constructed by the researcher's academic background. Admittedly, the research is value-bound and is subjected to bias. Values impact professional and educational insight, interpretation, and analysis of the findings. Adopting a researcher as opposed to a practitioner role throughout the data collection and analysis allowed for the recognition of these views and biases.

3.4 Interpretivism Research Choice

The nature of this research is interlaced and deeply grounded in interpretivism. The interpretivists argue that in researching the social world, it is essential to draw upon our human capacity to understand fellow human beings from the inside (through empathy, shared experiences and culture), rather than solely from the outside, in the way that we are forced to try to explain the behaviour of physical objects (Hammersley, 2013, p. 21) This research seeks to understand and explain the transition of educators through the perspectives of their journey. There is no emphasis on theory or hypothesis testing, as the researcher intends to deeply understand and provide meaning from individuals or groups of school leaders impacted by the transition into leadership within secondary schools. The aim is to understand the personal experiences of the school leaders by re-describing or re-constructing realities and analysing them into social scientific explanations of social phenomena (Scott & Morrison, 2006, p. 131). The reconstruction of the multiple social realities of the school leaders is 'time-specific, contextual and idiographic', and may lead to surprising findings, thereby providing social knowledge. Interpretivism attempts to understand why people do what they do, and how people

interpret and make sense of their world and act on their interpretations (Hammersley, 2013, p. 21). In understanding the transitional process, through the shared experiences, lessons, practices, feelings, and attitudes of the administrators or school leaders, there will be an understanding of the organizational culture, attitudes, challenges, and perceptions. This insight will help design or formulate principles that will assist others in navigating their new position or role.

To understand and explain the different experiences of educators transitioning to a management role, the information was ascertained using an interpretivist methodology. This is a design that allows the knowledge accessed to be interpreted using a qualitative, inductive, and subjectivist format, unlike the positivist methodology that follows a quantitative, deductive and objectivist format. This will allow for the detailed examination of the feelings (perceptions) and personal experiences of the respondents.

3.5 Research Design

The research design employed is phenomenology, which is rooted in interpretivism. This research aims to explore in-depth the transitional experiences of the respondent, through a reflective process, providing a fresh look at the transitional process. This section explores the nature of phenomenology and its relation to this research and considers the academic work of proponents of phenomenology.

3.5.0 Phenomenology

Phenomenology is a qualitative research method of social inquiry that provides a fresh look at phenomena through a reflective process or critique. Heron (1992) states, “phenomenology exhorts a pristine acquaintance with phenomena unadulterated by preconceptions: it encourages the inquirer to sustain an intuitive grasp of what is thereby “opening his eyes”, “keeping them open”, “looking and listening”, “not getting blinded” (Crotty, 2015, p. 80). Phenomenology focuses on understanding the experiences of social actors, events, and occurrences with disregard for external and physical reality. Understanding the phenomena and revisiting individuals' experiences has possibilities for new meaning, or the development of former meaning (Crotty, 2015, pp. 82-83). The phenomenological process reduces a human subject's experiences with a phenomenon to a description of its ‘essence’, written down usually, and so a qualitative researcher will identify a phenomenon as an ‘object’ of human experience and give voice to it (Creswell, 2013; Sloan & Bowe, 2014). Phenomenology was

the best option for this research as it allowed for the exploration of educators' experiences within their environment and culture rather than being limited to descriptions and established results. To understand the educators' processes and experiences and assign meanings to these experiences, 'the researcher's knowledge and presuppositions were bracketed so as not to taint the data' (Crotty, 2015, p. 83). This method provided a fresh perception of the transitional process based on the culture of the Jamaican people. The information acquired enhanced the culture through renewal or creation of new culture, to enhance and implement within the Educational sector that is for Jamaican society.

Phenomenology not only describes a philosophy of lived experiences but also a research methodology. Dudovskiy (2016) summarises phenomenology in business research studies as ideas generated from a rich amount of data through induction and human interests (p. 38). It is a first-person exercise based on objectivity and critique. Objectivity is garnered through open-ended semi-structured interviews of the proposed experience, rather than being content with a description of the experiencing subject and calling into question what we take for granted (Crotty, 2015, p. 83). This research also follows an exploratory and descriptive research design. According to Dudovskiy (2016), descriptive research aims to cast light on current issues or problems through a process of data collection, that enables them to describe the situation more completely than was possible without employing this method. In essence, descriptive studies are used to describe various aspects of the phenomenon (p. 66). In its popular format, descriptive research is used to describe the characteristics and behaviour of the sample population (Dudovskiy, 2016, p. 66). The exploratory design provides insight through continuous probing and helps the researcher to have an enriched understanding of the problem. The theoretical and philosophical framework of this research seeks to identify a phenomenon within the research by describing the respondents' experiences and then explaining this through interpretations and analysis of each case.

3.6 Research Methods

This section provides the reader with the method, technique, and procedures used for data collection. The appropriate research method and strategies are identified with detailed explanations and justifications for selecting the approach and techniques. The sampling procedure is associated with the data collection process and the data analysis framework discussed in this section.

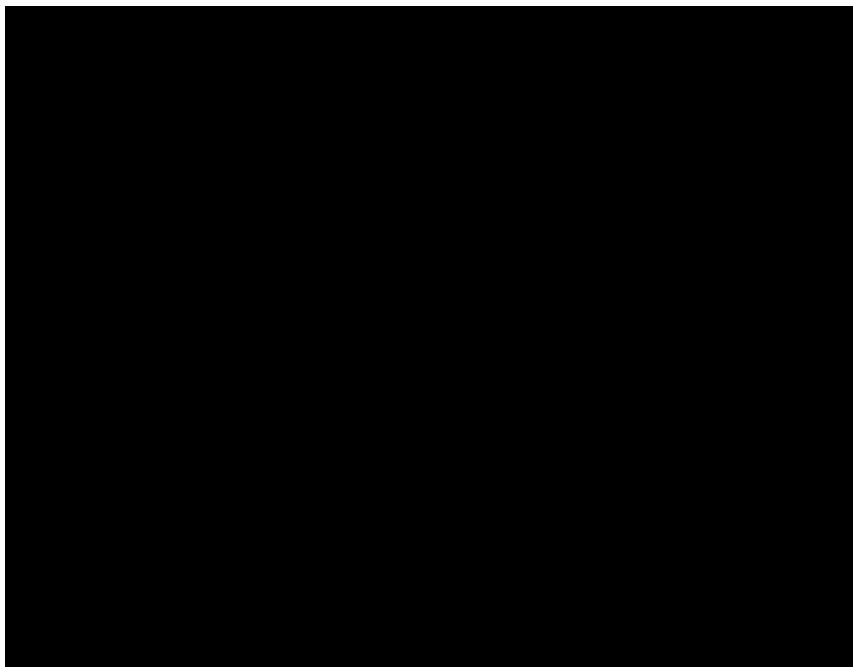
3.6.0 Identified Approach

The nature of the research and philosophical assumptions discussed thus far have steered this research reasonably to the qualitative research approach. Qualitative research is heterogeneous; many different qualitative research genres range from well-established traditions to more progressive qualitative research (Miles et al., 2020, p. 20). It is hard to fully describe, explain, or even define qualitative research, as it draws on a range of theoretical perspectives, features, and tools. This qualitative approach (Phenomenology) looks at the data thematically to extract the essences and essentials of participant meanings (Miles et al., 2020, p. 21). Qualitative research is ideal as it is conducted through intense, holistic, and prolonged contact with participants (Miles et al., 2020, p. 21).

The interpretivist perspective permits the use of an inductive approach. This approach allows for the development of other theories to explain observed data, personal experiences, and information collected. Since this approach does not have a rigid methodology, it provides for the development of theories. Inductive reasoning is based on learning from experience.

Figure 10

The Inductive Logic of Research



Note. The Inductive Logic of Research in Qualitative research is Adapted from Creswell, 2014.

Figure 10 shows the inductive flow of qualitative research and analysis. This research does not have an explicit theory, as is familiar with a positivist perspective. However, following the qualitative process as depicted on the flow of the chart, there is no specific theory or hypothesis evident at the beginning of the research. Nevertheless, it is based on the evidence and data collected from the participants to form ideas, theories, and conceptual frameworks based on inductive reasoning. Using the chart above, the information flows from bottom to top. Inductive reasoning is often referred to as a “bottom-up” approach to knowing, and the researcher may use observations or interviews to build an abstraction and prescribe a picture of the phenomenon being studied (Dudovskiy, 2016, p. 61). The opposite analytical approach is deductive reasoning for quantitative research.

“Inductive analysis refers primarily to approaches that mainly use detailed readings of raw data to derive concepts, themes, or a model through interpretations made from the raw data” (Thomas, 2006, p. 238). This approach is crucial for this research as the collection of administrators’ experiences will be sifted, analysed, and interpreted, from which a theory will be formed. There is no preconceived idea, theory, or narrow view to prove; instead, the data collected ‘speaks’ for itself. This process is not an easy one. It is time-consuming and difficult to predict based on social factors and other variables attached to the research. Having reviewed the various approaches and the underlying philosophies, it was evident an inductive approach was best suited, as this approach typically uses an inductive method, which leads to a more general understanding of the topic through the experiences of the educators transitioning. This approach draws a general conclusion from individual experiences and allows the researcher to develop meanings to findings that may be used to create guidelines for educators transitioning. The deductive approach starts with a theory that seeks to draw valid conclusions from initial premises and this research had no theories and hypotheses to be tested. The inductive approach and phenomenological design were the best fit to answer the research questions and to address the research aim and objectives of this research.

3.7 Ethical Considerations

In the phenomenological research design of this research, human interaction is an integral part of the research process; that is, the constant interaction between the researcher and the respondents, adhering to ethical concerns, is of utmost importance. Furthermore, a fundamental principle that governs qualitative research is essential: Do not tamper with the natural setting under research (Drew et al., 2008, p. 70). This research, however, was conducted by observing

research ethical protocols and principles of the Edinburgh Napier University Research Ethics and Governance Procedures. In addition, this research also follows the guided directions by Sieber (1992) & House (1990) to ensure moral conduct and accountability.

Ethical approval was acquired from the Edinburgh Napier University Business School Ethics Committee; the initial application was made during the pilot research stage of the research and then again at the beginning of the main research. Following the approval from the ethics committee, the research data collection commenced, following the safety advisor of the Government of Jamaica and Edinburgh Napier University Business School to proceed with physical, and social interactions.

The following three ethical principles, as outlined by sieber (1992), guided this research:

- Beneficence -maximizing good outcomes for science, humanity, and the individual research participants while avoiding or minimizing unnecessary risk, harm, or wrong.
- Respect- protecting the autonomy of (autonomous) persons, with courtesy and respect for individuals as persons, including those who are not autonomous (e.g., infants, the mentally retarded, and senile persons).
- Justice- ensuring reasonable, non-exploitative, and carefully considered procedures and their fair administration; fair distribution of costs and benefits among persons and groups (i.e., those who bear the risks of research should be those who benefit from it)

House (1990) outlined three other basic general ethical principles, with one overlapping with Sieber (1992).

- Mutual Respect – understanding others’ aims and interests, not damaging self-esteem, not condescending.
- Non-coercion or Non-manipulation – not using force or threats or leading others to cooperate when it is against their interests.
- Support for Democratic Values and Institutions – a commitment to equality and liberty, working against oppression and subjugation.

The construction of interviews and the technique used to garner information is essential in qualitative research. However, the construction of the interviews, techniques and the development of questions took time and consideration to eliminate bias while maintaining integrity and accuracy. The construction of questions was guided by the literature review and general principles identified by Sieber (1992) & House (1990) and employed during the

research interview process and procedures. The research sample comprised seven principals and five senior teachers employed at public high schools. When considering the principles to be applied, as detailed above, the following approach was practised.

3.7.0 Beneficence

The researcher has an ethical responsibility to the vested stakeholders, such as Edinburgh Napier University, the researcher's supervisors, family, and participants, the Ministry of Education of Jamaica, other school regulatory bodies in Jamaica, professional & educational colleagues, the field of research, and the research community to ensure that this research followed an ethical procedure. Furthermore, the research seeks to be beneficial to the stakeholders identified and the respondents who gave their time freely and supportively to advance knowledge and understanding. The researcher, therefore, has a moral obligation to all stakeholders to ensure research integrity and quality is maintained while adhering to ethical governance.

Those that participated in this research were not harmed, bribed, or forced to participate. The well-being of all respondents was adhered to as COVID-19 protocols were observed during face-to-face interviews. Some interviews were conducted using remote forms if respondents were concerned about their safety.

3.7.1 Respect/ Mutual Respect

The researcher agrees with Wilson (2010) that 'conducting research ethically is concerned with respecting privacy and confidentiality and being transparent about the use of research data. Ethical practices hinge on respect and trust and approach that seek to build, rather than demolish relationships' (Wilson, 2010, p. 89). To ensure confidence in the interview process and procedures, the respondents were assured by the University's research participant information and consent form (Appendix 1). The consent forms indicated the approach to be applied during the interviews and how the data gathered would be used.

These forms were sent to the respondents via email before the date of the interviews and discussed again at the beginning of the interviews. The respondents were given sufficient information and time to decide whether they wanted to give their consent. All respondents understood and signed these forms. The respondents were confident that their information would be used for only this research, and that their privacy would be withheld, that is, their names, schools, and any personal identification were removed from interview scripts and replaced with codes that only the researcher was privy to. Information that was given for knowledge and asked not to be recorded was not used in this research.

The interview date, time, location, or medium used to conduct the interviews were based on the preferences of respondents to ensure that they were comfortable. Respondents also had the freedom to change their minds and withdraw consent at any time, if they considered the approach taken compromised their values, professionalism, and integrity, or placed them in a position of concern in their current or future careers. A copy of the informed consent form is available in Appendix 2.

3.7.2 Justice / Non-coercion or Non-manipulation

The interviews were conducted at the convenience of the respondents that included their preferred date and time. The respondents indicated if they preferred a physical (face-to-face) interview or a remote method. All interviews were conducted in a comfortable and quiet atmosphere with only the interviewer and interviewee. Three interviews were conducted at physical workspaces, seven were performed using a video-conferencing mechanism, and two using the telephone. An email was sent to the interviewees before the interview questions to provide time for reflection and comfort. All respondents were allowed to withdraw any of the questions they did not consider appropriate or comfortable. However, no respondent asked for any of the interview questions to be removed. Assurances were provided to the participants that no right or wrong answer was being sought. The researcher was purely interested in their experiences of integration. A copy of the interview questions may be found in the Appendix 3.

3.7.3 Support for Democratic values and Institutions

The axiological framework of this research identified ethical, moral, and cultural similarities and possible differences. The researcher's value may have been influenced by the occupation, organizational involvement, and values constructed by the researcher's academic background. Therefore, the researcher implemented research procedures and practices to eliminate such bias. All respondents' views and experiences were treated with respect and fairness. The respondents' experiences were recorded as stated and they were given adequate time to process the questions and answer.

The protection of confidentiality, privacy, and anonymity of the respondents was maintained throughout this research. Coding was used to analyse and interpret data and ensure that respondents were not identified in any published report. In addition, respondents' names and consent forms were kept in a locked cabinet in the researcher's home office. Thus, the published results do not mention respondents' names, and they are not identifiable even from quotations.

3.8 Process of Conducting Research

This section seeks to discuss and clarify the data collection method used in this research. The section begins with identifying the data method used, with details of the reasons for selecting the methodology. The section continues with the sampling technique and process used. This is followed by a discussion of the data analysis method identified and the procedures executed explained.

3.8.0 Data Collection

In considering the data collection method, various factors had to be considered for this research. The key concerns were the health, safety, and accessibility of respondents in Jamaica. This research was executed within the time frame of the coronavirus pandemic (COVID-19). The nature of the virus affected the social and economic environment, thereby affecting the administration of this research. The elements of a pandemic required attention to specific ethical concerns and prescribed research formats. The pandemic impacts on personal health and wellbeing, livelihoods, the physical environment, and the economy meant adjusting the research processes and procedures to meet the context to protect the respondents and the researcher was critical”.

Another concern was selecting a data collection technique that followed the nature of the research and extracting detailed data from the respondents through a comfortable interaction, allowing the educators to reflect on their transitional period and process, and reveal their stories in their own words. According to Smith et al. (2012), “in-depth interviews and diaries are the best to acquire such rich data” (p. 56). “These methods elucidate stories, thoughts, and feelings with an intimate focus on one’s person’s experience” (Smith et al., 2012, p. 56). This research dictates a method that would provide adequate, accurate data that would attend to the complexity of the research. It is for such a reason that a mono-method of data collection was selected.

In phenomenological research, interviews are widely used, specifically semi-structured interviews (King et al., 2017; Smith et al., 2012). Phenomenological interviews involve an informal, interactive process to evoke a comprehensive account of the personal experience of the phenomena (King et al., 2017, p. 175). Semi-structured interviews exemplify Interpretivist Phenomenological Analysis (IPA) because they emphasise exploring how people interpret their experiences. Therefore, following the philosophical and theoretical foundation of this research,

the most appropriate method was semi-structured interviews (Smith et al., 2012). Semi-structured interviews are sufficiently structured to address the transitional process and any related issues or topics that may develop from this research. A semi-structured interview refers to a context in which the interviewer has a series of questions in the form of an interview guide (King et al., 2017). The interview guide provides prompted questions that allow the respondents to respond and engage in a dialogue, providing opportunities for follow-up question(s) and clarification. Semi-structured interviews provide a great deal of leeway in how the questions are asked, as questions not included in the guide may also be asked as the interviewer picks up on things said by the interviewees (Bryman & Bell, 2015, p. 483). According to Smith et al (2012), these unexpected turns are often the most valuable aspect of Interviewing (p. 63; Hanna, 2015). These unexpected turns give additional information not anticipated that may be of particular importance to the respondent, which is the essence of the story for research.

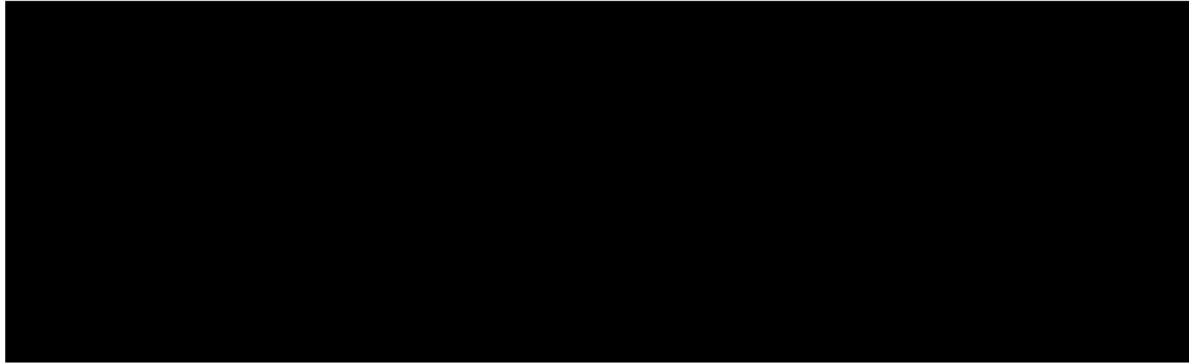
The use of semi-structured interviews generates ‘rich data’ from the respondent for constructing knowledge. The semi-structured interview was a suitable method for this research as it allowed for the discovery and uncovering of the educator’s perceptions and challenges faced during the transition. The interview process was interactive and requires interviewees to be attuned and very responsive to the interviewee’s emotions and body language to facilitate not just ‘what people say but also in the way that they say’ (Bryman & Bell, 2015, pp. 487-488).

Using semi-structured interviews required active listening, observation, and the use of an audio-recording device for the interviews. The audio recordings were transcribed to follow the requirements of qualitative research. According to King et al. (2017), the length of time and detail taken to record and transcribe data is beneficial and should be observed to prevent threats to the recording quality, missing context, and the tidying up of transcribing talk (p. 175). The transcription process was very time-consuming, tedious, and required patience to capture the data. The data was captured verbatim and took extensive time depending on the quality and length of the audio. However, the process was beneficial as it allowed the researcher to immerse into the interview process, engage with each interviewee, and recall valuable features of data for analysis. This familiarity with each interview script helped in discovering patterns and themes, thereby increasing productivity during the Interpretivist Phenomenological Analysis process (Langdridge, 2004; King et al., 2017). From transcription, several verbatim quotes were used in the findings for clarity of themes, evidence and understanding of thought.

Semi-structured interviews do have challenges, as most research methods may allow direct or indirect influences on the interview process (Bryman & Bell, 2015). For instance, the temptation to lead a conversation based on existing knowledge or trying to connect with previous comments were possible issues. However, the interviews were managed due to this understanding, and of such, previous knowledge bracketed (Smith et al., 2012). The aim, however, during data collection was to abide by the interview procedures and standards.

3.8.1 Remote Interviews

A typically semi-structured interview in phenomenology research uses mostly open-ended questions face to face, which presents an environment that is relaxed and open for personal discussion. However, conducting research at the beginning of the coronavirus pandemic (COVID-19) required flexible methods for interviewing respondents. In recent times, there has been development in Interpretivist Phenomenological Analysis (IPA) of computer-mediated data collection and the use of synchronous and asynchronous interviews (Smith et al., 2012, p. 57). The use of remote interviews can involve collecting different types of data that are spoken or written. Remote interviews usually accommodate one (or more) of these three reasons: physical distance from the participant, availability of the participant, and the nature of the interview topic (King et al., 2017, p. 79). Various forms of remote interviews include telephone, video conferencing, email, and instant messaging. The COVID-19 pandemic shifted society to do most of its interaction using synchronous platforms. As a result, remote interviews were used to conduct the semi-structured interviews based on various factors, such as the public health advisor of Jamaica and Edinburgh Napier University. Table 3 shows the various forms of Remote Interviews for research.

Table 3*Forms of Remote Interviews*

Note: Main forms of remote interviews from King et al. 2017.

The use of telephone and remote video/video conferencing was suitable for this research but ought to be managed effectively. The pandemic allowed access to several free and safe online communication software with recording capabilities such as WebEx, Zoom and Microsoft Teams. The use of video conferencing and its superb quality and features offered a similar face-to-face experience. In earlier years and stages of remote technology, Hanna (2012) stated “that as technology develops further and becomes more reliable and predictable, remote video interviewing may provide qualitative researchers with a way of offering ‘face to face’ experience, while retaining the practical advantages relating to flexibility and privacy offered by telephone interviews” (p. 241).

A primary concern with using video conferencing is the reliability of internet connections, the familiarity with software, and respondents' participation in this form of an interview. There is the possibility that some respondents may be deterred from taking part because they are not comfortable with the idea, or they are not technologically savvy (Weller 2017). A poor internet connection will affect the data received based on sound and video quality. This would affect the flow of the interview process, thereby having a negative impact. Weller (2017) reflects “that these interactions may replace some of the small talk and pleasantries usually common at the start of an interview, potentially even functioning as an alternative way to build rapport in remote video interviewing” (p. 617). Poor quality of sound and video would lengthen the time in transcribing.

Focus groups are considered as a common method used for collecting data in qualitative research. However, the presence of multiple voices and the interactional complexity of focus

groups make it difficult to infer and develop the phenomenological aspect of IPA (Smith et al., 2012, p. 71). Therefore, the use of interviews would allow respondents to share their lived experiences in a private and comfortable setting, without consideration of commentary or potential reprisals was valuable.

3.8.2 Sampling

The nature of qualitative research is to purposefully select participants or sites (or documents or visual material) that will best help the researcher understand the problem and the research question (Creswell J., 2014, p. 13). In addition, Bryman & Bell (2015) states that the research questions provide guidelines as to what categories of people should be focused on and sampled (p. 429). The sampling method used was purposive sampling. Purposive sampling is the preferred method rather than random sampling (Bryman & Bell, 2015, p. 428); it places the investigator's research questions at the heart of the sampling considerations (Bryman & Bell, 2015, p. 429).

There are disagreements and various perspectives on the appropriate sample size for qualitative research. However, the sample size should be based on the nature, design and sampling method identified. Bryman and Bell (2015) state that rather than relying on other impressions of suitable sample sizes, it is almost certainly better to be clear about the sampling method used and the reason for using it (p. 436). Coyle et al (2014) states that in traditional phenomenological research, the average sample size was between one and twelve (p. 116). “A professional doctoral studies sample size is usually between four and ten” (Smith et al., 2012, p. 51). However, there is no right answer to sample size, and a larger sample does not reflect reliability and validity (Smith et al., 2012). The primary focus of the IPA sample size is generally small and mirrors quality and quantity.

According to Smith et al. (2012), IPA is concerned with particular phenomena that need detailed case by case analysis of transcripts. The focus of a small size is not insufficient, but instead allows for adequate testing and emphasis. A detailed case-by-case analysis of individual transcripts takes a long time and requires concentration to provide accuracy and confidence in the claims made, hence the small sample (p. 51). The varying sample size of research depends on the orientation and the purpose. According to Bryman and Bell (2015), rather than relying on other impressions of suitable sample sizes in qualitative research, it is almost certainly better to be clear about the sampling method you employed and why the sample size you achieved is appropriate to achieve adequately defined research (p. 438).

The sample selected of twelve respondents was sufficient and should provide quality, and raw data, primarily since these individuals are specifically selected. The purposefully selected size provides for 'rich data' and case-by-case analysis using IPA. This allows for an in-depth interview of detailed accounts of individual lived experiences that is not overwhelming. Data from the twelve respondents should provide sufficient cases for the development of a meaningful interpretation of similarities and differences between transitioned managers.

3.8.3 Sampling Process

The sample represents a perspective rather than a population as purposive sampling does not generalize to a population (Bryman & Bell, 2015; Smith et al., 2012). The sample selected represented educators who transitioned into leadership roles across four parishes of Jamaica, including the island's major cities, as the research is specific and relevant to teachers that are positioned as hybrid managers. These teachers moved into managerial roles such as principals, vice-principals, heads of departments, senior teachers, and grade coordinators within secondary institutions in Montego Bay, St. James and Kingston, St. Andrew.

The total number of secondary schools in the areas identified is forty-seven, inclusive of thirty-seven in Kingston & St. Andrew and eleven in St. James (Livingston, 2016). This homogenous sample allows for examining detailed psychological variability within the group by analysing the pattern of convergence and divergence that rises (Smith et al., 2012). In addition, the use of these samples is to understand their experiences from a different perspective, such as their positions and subculture based on location and type of school. This will allow the researcher to develop a more detailed and multifaceted interpretation.

3.8.4 Sample Participation

The sample included participants with different professional experiences, school cultures and environments. These respondents were from traditional and non-traditional schools, small and large schools, coeducational, all boys and all girls. The participants selected represented an unbiased subset that met the characteristics of this research and would provide rich data to be analysed. The participants represented a cross-section of educators that transitioned into managerial roles between one to ten years. In the Jamaican school system, school leaders, when promoted, usually stay in the position until retirement, migration, change in profession, or are appointed to areas with the Ministry of Education. Therefore, the sample selected especially of

principals would be few of those that were recently appointed within five years compared to senior teachers.

The participants comprised seven principals, inclusive of two females and five males. A few principals transitioned from school to school and reflected on their transitioning process and provided meaningful comparisons on their journey as well as retained information on their initial transition. Five senior teachers, who are teachers with additional responsibilities, were interviewed, which included four females and one male. One principal and a senior teacher were recently promoted in the academic year 2019. The principal was previously employed as the school's vice-principal and acted in the principal role for two years before the appointment. Few senior teachers had prior experience filling the role of Head of Department and Grade Coordinator before being promoted years later. From the sample, only two individuals were from the same school: one male principal and a female senior teacher. All senior teachers and one principal were appointed in their school of employment, whilst the other six principals were appointed at other schools. The diagram below outlines the attributes, qualifications and experience of the sample identified. To provide a more detailed account of the Sample group Table – below provides information related to teaching and educational qualifications, years of experience and years employed by MOEYI. Another table is included in the Appendices with additional demographic details.

Table 4

Demographic and attribute table of principals and senior teachers

ID#	Certified Teacher	Yr. Employed by MOEYI	Yrs. of Experience before Appointment	Positions of Responsibility	Experience	Qualifications
001	Yes	1997	15yrs	H.O.D Technical & Creative Department & Grade Coordinator	Teaching experience at four prior schools before current school in 2003. Acted as H.O.D of Language Department 2011 & 2017 (Current School), Form Teacher	B.A. English Language & Literature Postgraduate Diploma in

						Education (2010)
002	Yes	2008	9yrs	Grade Supervisor 10/11 (Alternate)	Cluster-Based Mathematics Specialist (1 year), Teacher, Only School (2009)	B.A. Education in Mathematics
003	Yes	2006	10yrs	Grade Supervisor 11	E-learning Coordinator (current school), Form Teacher, Only School	BSc. Computing and Management Studies, Masters in Management of Science in Education (2009), Postgraduate Diploma in Education & Training (2014),
004	Yes	2002	16yrs	Media Representative & Curriculum Development. Master Teacher	Active in School activities. Only School	B.A. Education in Social Studies. NCEL Certification 2018-2019
005	Yes	2007	3yrs	H.O.D. Humanities	Only School	Diploma in Social Studies and History Education 2007 B.A in History Education 2009 Masters in Education

						Leadership (2016)
ID #	Certified Teacher	Yr. Employed by MOEYI	Yrs. of Experience before Principalship	Principal Training Before appointment	Positions before Principalship	Master's Qualification
006	Yes	1994	15	No	Senior Teacher	Yes
007	Yes	1998	10	No	Senior Teacher	Yes
008	Yes	1990	15	No	H.O.D at Tertiary level	No
009	Yes	1981	27	No	Senior Teacher Vice Principal	Yes
010	Yes	1988	14	No	Lecturer at the Tertiary level	Yes
011	Yes	1990	24	No	Senior Teacher, Vice Principal	No
012	Yes	1996	20	No	Principal at a Private institution	Yes

3.8.5 The Data Collection Process

The COVID-19 protocols of Edinburgh Napier University and disaster emergency laws by the Jamaican government guided the data collection process. The process was delayed following the university's guidelines of suspending face-to-face interviews or gathering any other type of data involving human contact. In addition, the Jamaican government imposed a stay-at-home order and a closure of schools in March 2020. This impacted the gathering of the data process and, subsequently, the methods used to gather data. The data collection process started with the approval of the university, the ethical committee, and the re-opening of the Jamaican economy in June 2020. However, the opening of the Jamaican economy was limited and caused a delay in access to respondents. Schools continued online learning activities and stay-at-home orders based on the organization's capacity or need.

The established data collection technique considered for this research was semi-structured interviews. However, areas of this approach had to be modified to follow clear protocols of risk assessment and mitigation strategies, to ensure protection from the risk of infection and to mitigate other health risks, including potential mental health impacts on research participants

and the researcher (International Development Research Centre, 2021). The pandemic created human challenges that were gripped with fear, anxiety, and economic uncertainties. The health and safety of the researcher and respondents were the primary focus of the research while maintaining ethical obligations. The ethical factors considered were the safety, accessibility, and privacy of the respondents.

Safety and accessibility to respondents were essential as most respondents operated from their homes to do their work-related activities. In some cases, they only went into the office once or twice per week, which meant that appointments were limited or non-existent, depending on the protocols of each administration. Therefore, the data collection method included online semi-structured interviews to eliminate the risk of infection, ensuring that respondents were comfortable and easily accessible. For respondents who were not comfortable using online platforms, face-to-face semi-structured interviews were conducted while adhering to social distancing measures.

The data were collected mainly using video conferencing, telephone, and face-to-face interviews. Seven respondents were interviewed using WebEx, three face-to-face, and two by telephone interviews. The telephone interviews were used due to technical issues that developed before starting the video conferencing method, and respondents agreed to the use of such an instrument. These methods allowed for flexibility in approach and the following up of semi-structured interviews, the criterion for qualitative research (Bryman & Bell, 2015). The interview flowed naturally with spontaneous responses, which enhanced the quality of information given by the respondents. The data gathered was recorded, which provided additional information or unsolicited accounts that gave revealing data. The data collection identified and used had advantages and were appropriate for this research and environmental circumstances. The respondents were comfortable, less distressed, and open in their delivery.

The data collection procedure was organized in the following stages discussed:

Stage One

Respondents were initially contacted via telephone for their participation in an interview. The purpose of the research was explained, the procedure discussed, and their valuable contribution solicited. All the respondents contacted were delighted to share their experiences and agreed to a date and time for an interview during initial discussions. Subsequent to the telephone arrangement, the ethical approach to be adopted, consent forms and interview questions were

emailed to the respondents. The follow-up procedure included confirming the interview date and time a day before the interview by calling or sending a message to the respondents.

Stage Two

The interview process took place between June 1, 2020, and June 12, 2020. Scheduled dates and times were based on the respondents' availability. Each respondent determined the medium used to conduct the interviews to ensure that the respondent was comfortable and relaxed. Before each interview, an explanation and reminder of the research purpose was offered to every respondent, and it was verified whether they were still open to participating and recording the data. The reason for recording the interview was explained as being the nature of qualitative research that requires transcription. They were subsequently reminded that each recording would be coded before transcription to ensure the participant's identity could not be identified. All respondents agreed to the recording of their interview process that was between the interviewer and interviewee. The interview process was between forty- five minutes to an hour and forty-five minutes. The respondents provided adequate data as the respondents were extremely comfortable with the discussion.

Stage Three

After the interview, the respondents were thanked for their participation in the interview. Then, each respondent was asked if they wished to review the transcript after the transcription process. While no one requested a copy of the transcription, four respondents indicated interest in obtaining a copy of the final thesis.

Stage Four

Each interview was transcribed in the numeric order that it was collected during the first stage using a transcribing software called Otter. The software was tested using the free version, and then a premium package was purchased for a month's access. This software helped significantly, even though the researcher had to input missing data manually. The software process took 20- 30 minutes to process the recording and upload the transcribed data. Then, the researcher started the tedious process of listening to the recording and ensuring that each data was captured verbatim. This missing data were inputted manually using the same software through listening to audio recording and matching each word and sentence. The transcribing process was time-consuming and started at the end of the interview process on June 12, 2020, and was completed by August 31, 2020. The interviews were recorded, and the recorded data

were later stored on a Google storage and Otter Cloud password-protected account. The data were recorded using a coding process to ensure that data could not be linked to the respondents. The data was not accessed by anyone other than the researcher and was discussed only with university supervisors.

3.9 Pilot Research

In preparation for this research, pilot research was conducted between the period May 2019-June 2019. Pilot research is defined as a smaller version of a proposed or planned research conducted to refine the methodology and other research protocols for the actual research (Musil & Givens, 2017, p. 579). The pilot research was a testing mechanism of the topic, research questions, approaches and research methods identified to be used in the research. This pilot research gave a clearer vision of the way forward in the research. From the pilot, research changes were done for the development and execution of this research.

3.9.0 Pilot Research Methodology

The pilot research topic was **Continuing Professional Development (CPD): The Perception and Challenges of Educators transition into leadership roles within the school system in Jamaica**. The research had four guided objectives used in the formulation of questions for data collection. First, the research approach followed an interpretivist perspective that was rooted in phenomenology. The nature of this research required the use of the interpretivist hermeneutic phenomenological approach. Secondly, the method of data collection followed a qualitative method, in which a multi-method strategy of semi-structured interviews and non-participant observation were used. The sampling method used in the research was purposive as this offered insight into the experiences of educators who transitioned into leadership roles. The sample size selected was two respondents; the chosen size was small because Interpretative Phenomenological Analysis (IPA) is concerned with particular phenomena that need detailed case-by-case analysis of transcripts.

3.9.1 Pilot Research Data Collection

The questions included fourteen open-ended questions that were reviewed in a pre-testing with other educators. The respondents used were a recently retired female Principal in St. James and a male Vice Principal in Kingston. Both respondents transitioned from high school teachers to educational leaders. These samples were used to understand their experiences from a different

perspective, such as their positions and subculture based on location and type of school. The interviews were conducted using Skype, as respondents could not meet face-to-face due to conflicting schedules. This provided training or access to the unseen pandemic. The interviews were conducted after seven pm at the convenience of the respondents in their homes in a quiet room. The interviews were recorded with the permission of the respondents.

The data collected were recorded and transcribed verbatim. Like most Interpretative Phenomenology Analysis, data was examined using thematic analysis to ‘extract essences and essentials of participant meaning’ (Miles et al., 2020, p. 20). In addition, the data collection process offered insight that semi-structured interviews provided detailed content for analysis. The pilot research revealed that the area of research was a symptom within the education system. It was discovered that a lack of Continual Professional Development (CPD) resulted in the dysfunction of promotion. The pilot research pivoted the initial intent to identify the key factors, root causes, and problems developed when educators transition into leadership, as well as to explore whether professionalism in an area qualifies an individual to be a manager. The research, therefore, became truly exploratory as it has developed beyond a symptom that is Continual Professional Development, to exploring professionalism versus managers’ transition. The researcher, therefore, focused the research on the transitional process to determine the root cause or challenges during transition. This led to the refocus of the research to **“The Emperor’s New Clothes?! Understanding the experience of Educators in their transition to school management roles in the secondary school system in Jamaica”**. It was determined that the sample size was adequate for the pilot and the data gathered allowed analysis and interpretation. The pilot research proved that a small sample size would provide the experience needed to be analysed. The qualitative research process, although very time-consuming, was indeed rewarding. The method of transcribing allowed the researcher to be familiar with the data for analysis. The pilot research identified various strengths and weaknesses of the research and the researcher. It was indeed a learning process that provided a key platform for the actual research. The pilot research provided a clearer understanding of the type of research and the philosophical underpinning to be administered. This process is discussed next.

3.9.2 Content of Interviews

From the pilot research, the redirection of the research topic led to refocusing of the literature. Through careful revision and consultation with the researcher’s supervisors, the research

questions and interview questions were altered based on the refocus of the literature on the transitional process. The researcher identified that the use of semi-structured interview questioning was ideal for this type of research.

The specific methodological choice selected for this research was the mono-method, or mono-strategy research. This is the use of a single qualitative method to collect data for this research. It is argued that mixed-method or multi-method research is effective as it retains meaning and gives a holistic view. Some scholars state that mono-method research is often weak in providing comprehensive solutions to problems while other methods strengthen research reliability.

The focus is an in-depth understanding of the transition process and producing the hidden themes. In the pilot research, multi-method, qualitative research was used. Unfortunately, this method was ineffective and underutilized for this research. The recommendation from the pilot suggested that the interviews gave valid data, and the observation did not. This was mainly because the information needed was based on the individual's experiences, and other methods could not give such detail. IPA aims to design data collection events to elicit detailed stories, thoughts, and feelings from the participant and one method can do this (Smith et al., 2012, p. 57).

The use of interviews allows for 'rich data' in which the respondents speak freely and reflectively about their experiences (Smith et al., 2012, p. 58). The type of interviews selected for this research was semi-structured; this allowed one-to-one discussions and in-depth dialogue with the respondents. This form of interview permitted respondents to comfortably recount, explain, and give meaning to their experiences in their own words.

Semi-structured interviews were also selected because of the flexibility of questioning that was guided by prompts. The prompts were questions designed to help with the flow of questioning and were very effective in the pilot research. In the pilot research, prompt questions allowed the respondents to give hidden data that was useful and added to the interview guide for further questioning. The guide used in the interview allowed the researcher to modify questions based on answers from the respondent for clarity, or even to probe for deeper understanding. Therefore, this method allowed adequate data to uncover the hidden information and interpret, explain, and bring forth the purpose and meanings discovered. An advantage of using interviews to capture the data is that greater interest is in the interviewee's perspectives (Bryman & Bell, 2015, p. 484).

The interview questions were designed to explore the transitional process, perceptions, challenges, and mechanisms that enable the transitional process. The questions were open-ended and intended for discussion and reflection. This form of questioning allowed the probing of responses for clarification and critical reflection of the process by respondents (Bryman & Bell 2015). They allowed the respondents to reflect on their journey by providing their years of employment, earlier positions, and qualifications. The progression of the questioning created a flow. It was noticed that the interview flowed with little intervention from the researcher. Respondents flowed into the following line of questioning or even gave information that the researcher would have probed. The discussion from the respondents provided rich data, especially from respondents that were in the education system longer. They were able to compare and contrast transitional processes based on structural and organisational changes. The interviews did not seem lengthy and were very informative. The respondents all appreciated the discourse and stated that they were willing to assist further if needed.

3.0.0 The Insider -Outsider Perspectives

An insider-outsider perspective occurs when the researcher is investigating or exploring their organisation, group, or community. Dwyer and Buckle (2009) defined an insider as someone who shares the characteristics, role, or experience with the group under research, whereas an outsider is a stranger to the organization (p. 54). During data collection, the researcher was employed within the secondary school system as a trained educator and was familiar with the education system and the promotion of principals and senior teachers/managers due to the researcher's fourteen years tenure. Various authors and literature suggest that the insider perspective allows special sensitivity, empathy, and understanding of matters, which may not be so apparent to an outsider. It may lead to greater bias or a research direction that is more important to the researcher (Priola, 2021). The interviews were conducted professionally and remained sensitive to any biases. The researcher was able to detach from the association with the respondents and remained professional. Thus, the research obtained both insider and outsider knowledge, and maintained the appropriate detachment.

3.0.1 Data Analysis Interpretative Phenomenological Analysis

The origins of Interpretative Phenomenological Analysis are credited to Jonathan Smith, a health psychologist in the United Kingdom (Smith et al., 2012, p. 2). Interpretative Phenomenological Analysis (IPA) is a qualitative approach that aims to provide detailed

examinations of personal lived experiences (Smith et al., 2012, p. 79). This approach was selected for this research as it examines how people make sense of their significant life experiences and provides the opportunity for exploring and gathering detailed information by examining a phenomenon that relies on lived experiences of others. Interpretative Phenomenological Analysis is influenced by philosophical and phenomenological perspectives based on a detailed collection of primary reflective data. Interpretative Phenomenological Analysis has three significant frameworks to understand the process and method. These are phenomenology as a philosophical approach, hermeneutics and idiographic.

Descriptive and interpretive approaches are two approaches to phenomenology. Descriptive or transcendental phenomenology was developed by Edmund Husserl and interpretive, by Martin Heidegger (Sloan & Bowe, 2014). The descriptive tradition of phenomenology was further developed by Merleau-Ponty, while the interpretive approach was developed mainly by Heidegger and Gadamer. According to Crotty (2015), Husserl's framework of descriptive research focuses on 'seeking realities not pursuing truth' in the form of manifestation of phenomena, as it is in the form of a lifeworld made of interconnected, lived experiences subjectively (p. 27). On the other hand, the development of Heidegger and Gadamer interprets the descriptive experience by explaining and analysing methods.

Edmund Husserl's phenomenological ideas require identifying the essential qualities of that experience by adopting a phenomenological and reflective attitude. Husserl's phenomenological inquiry focuses on the experiences in the consciousness of the individual. He invokes the technical term, 'intentionality' to describe the relationship between the process occurring in consciousness and the object of attention for that process (Smith et al., 2012, p. 12). Intentionality is the idea that our consciousness is always directed towards something, which means that when we experience something, it is an object in memory or imagination. The validity and reliability of the descriptive phenomena are gained by bracketing or reducing distractions and misdirection of their assumptions and preconceptions. Husserl developed an intentional analysis of how experiential processes proceed and what is experienced, and eidetic analysis is the technique used to understand lived experiences (Smith et al., 2012, p. 13). Scholars such as Husserl, Heidegger, Merleau-Ponty, Sartre, Schleiermacher, and Gadamer are leading figures in phenomenological philosophy and most relevant to IPA research (Smith et al., 2012). These scholars have contributed to the development of phenomenological philosophical research to focus on (a) existential meaning, (b) the constant interaction between

participant and context, and (c) the emphasis on historical, contextual, and political forces on participants.

This research entails exploring the realities, variables, and elements that respondents have used to understand their process in transitioning into leadership roles. This information is quickly gained by the interpretivist hermeneutic phenomenological approach. Hermeneutics is the theory of interpretation and is the second theoretical groundwork of Interpretative Phenomenological Analysis (Smith et al., 2012). Hermeneutics phenomenology is recognised mainly by the works of Martin Heidegger (phenomenological hermeneutics) and Hans Gadamer (philosophical hermeneutics). Hans Gadamer transformed the earlier work of his teacher Heidegger. These men, however, were influenced or inspired by Edmund Husserl's phenomenology as a method.

The two theorists (Heidegger and Gadamer) are essential for this research as their theories are used to guide the analysis. Heidegger examines phenomenological research in terms of Being and Time, in which he dissects the various meanings of the term Appearance (Smith et al., 2012, p. 23). Heidegger identifies that phenomena have specific visible meanings and hidden meanings (Smith et al., 2012). Therefore, the aim is to examine the transitional process of the teachers into their roles (the thing itself) and analyse the information by 'making sense of that appearing' (Smith et al., 2012, p. 25). Hermeneutics by Heidegger attempts to understand the world's phenomena as they are presented to us, understand the world as it is presented, and understand itself (Cohen et al., 2013).

Heidegger and Gadamer clarify the hermeneutics perspectives and help the research process, as data is examined thoroughly based on revealed and concealed data. Gadamer pays keen attention to the interpretation of the data and how this is carried, and elements that may influence the data. The data is also interpreted and influenced by text, language, and symbolic activities during the data collection process. Both Gadamer and Heidegger know that the researcher may not be aware of the preconceptions, but the methods and processes employed during collection and analysis present clear and deep findings. The research process includes the significance of the existing world and its meanings for the investigator and the interpretive team; hermeneutic interpretive phenomenology's philosophical framework acknowledges that people are inextricably situated in their worlds (Crist & Tanner, 2003, p. 203). The complex and dynamic way in which they unpack the relationship between interpretation and fore

understanding may reveal a more robust and cyclical reflexive bracketing (Smith et al., 2012, p. 27).

It is essential to understand that the interpretation of data requires an active role of the researcher; this interpretation is complicated by the researcher's perceptions and experiences. To ensure validity and reliability, a two-stage interpretation process or a double hermeneutic process takes place. 'Double hermeneutic' is a term coined by Giddens (1976), and it is a philosophical construct based upon Heidegger's (1927) notion of the Dasein concept, interpreted here as a form of presencing, that is, to the researcher's presence within the research process (Mills et al., 2012).

Double hermeneutics is essential when interpreting data and the research process of 'making sense of the participant sense making' or interpreting the 'meaning and meaning making' (Smith et al., 2012). According to Mills et al. (2012), double hermeneutics is used to name interactions between the text attributable to the research focus, topic, or participant and the text the researcher brings to the inquiry. The context of that which is being researched (often referred to as the object of the research) and the context of the researcher (often referred to as the subject of the research) interact dialogically and co-inform one another within the research process. Double hermeneutics requires that the researcher tends to the dual, or double, meanings present at both the micro-levels of research design and the macro levels of situating the research within a given social science community (Mills et al., 2012).

The third theoretical framework of IPA is idiographic. According to Smith et al. (2012), "this is a process that moves from an examination of a single case to more general claims. This is opposite to the quantitative approach of scientific inquiry nomothetic" (p. 29). Idiographic is exploring the nature of individuality and human differences in single in-depth cases. This provides a comprehensive understanding of a particular case, which may also lead to discovering general principles applied to a group (Smith et al., 2012). The purpose of the idiographic is to highlight and give value to each case equally, and subsequently, each participant through systematic, thorough analysis (Pietkiewicz & Smith, 2014, p. 8). IPA conducts a detailed single case analysis for each participant before identifying and comparing patterns across a case that will be useful in analysis and understanding.

The use of IPA will provide rich interpreted data that will provide information for other aspiring educators transitioning into administrative positions. According to Van Manen (1990), the purpose and benefits of IPA are that "we gather other peoples' experiences because they allow

us to become more experienced ourselves” (p. 4). In addition, its comprehensive philosophical, theoretical, and methodological framework provides reliability and validity for in-depth exploration of experiences or cultures.

3.0.2 Analysis of Research

The analysis of the data collected was done using the literature review and the qualitative analysis process. The use of the literature review is key and vital for all academic research activities. A literature review serves as a basis for knowledge development, creates guidelines for policy and practice, provides evidence of an effect, and, if well conducted, can engender new ideas and directions for a particular field (Synder, 2019, p. 334). Therefore, the literature review is critical in analysing data with knowledge developed or recorded.

The literature review provided developed knowledge on transitions, the effectiveness, challenges and the relevance and effectiveness of CPD. The literature review also provided three frameworks of the transition process in the organization and possible methods to help in the process. This was used to evaluate the frameworks or theories identified in aspects of the literature. This information and analysis provided a framework for the development of a conceptual model with guided principles for those transitioning and the education sector.

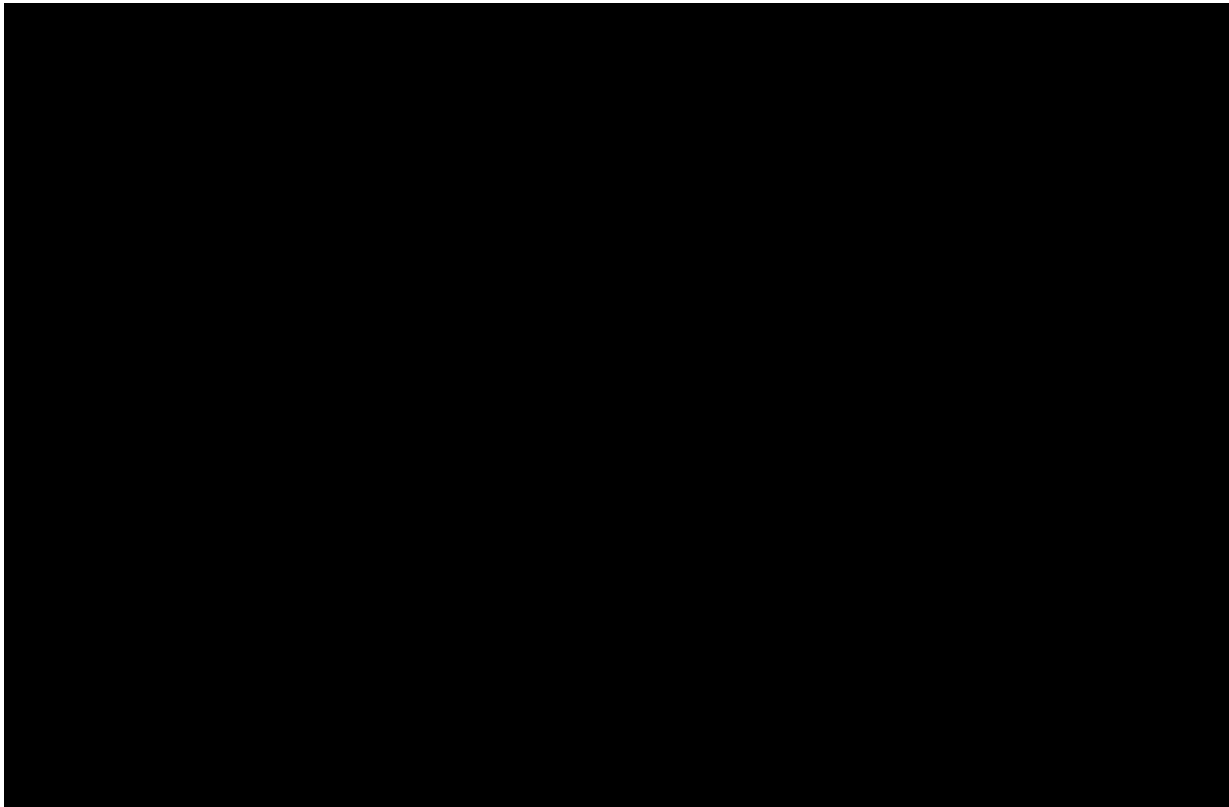
The process of qualitative analysis is described as an art. “The interpretation is a complex and dynamic craft, with as much creative artistry as technical exactitude, and it requires an abundance of patient plodding, fortitude and discipline” (Schutt, 2020, p. 323). The intent for using a phenomenology approach is firstly to describe the data collected from the respondent, followed by interpreting the data. Therefore, according to Smith et al. (2012), although the primary concern of IPA is the lived experiences of the respondent and the meaning that the respondent makes of that lived experience, the result is always an account of how the analyst thinks the respondent is thinking (double hermeneutics). The participants' approach is trying to make sense of their world; the researcher is trying to make sense of the participants trying to make sense of their world.

The analytical process for IPA is described as a multi-directional, flexible, and innovative process. It involves flexible thinking, processes of reduction, expansion, revision, creativity, and innovation (Smith et al., 2012, p. 43). This research followed the general guiding principle or step-by-step of IPA analytical processes. The qualitative data was analysed using thematic analysis. This method identifies themes and patterns from the data collected. All aspects are considered in analysing the data, such as the physical surroundings, objects, other people

present, type of activity, outcome, social and personal interactions, time frame, emotions, belief or value systems, and attitudes. The below identifies the steps that were followed to analyse the data. Table 5 reflects the sequence that was followed to garner data from each interview transcript.

Table 5

Guides for analysis of Interpretative Phenomenological Analysis



Note. Steps/ guides for analysis of Interpretative Phenomenological Analysis adapted from Smith et al. 2012.

The data analysis method selected was very time-consuming but proved to be efficient and effective. The process used was very technical and primarily manual. Through discussion with the supervisory team, the use of any software was not used. Instead, a manual process was determined to allow the researcher to be fully immersed and familiar with each respondent.

Step 1 – Reading and Re-reading

This is referred to as the immersion step or phase that begins at the interview process in which there is active listening and review of phenomena. The researcher realized that early analysis began during interviews through reflective discussion and commonalities evident during the discussions. The labelling and careful review of transcripts began at this stage. This step involves constantly immersing the data by reading and re-reading the data and identifying patterns by taking notes. The data immersion also included long hours of transcribing the data and listening to recording data while reading the transcript. This process allowed familiarization with the respondents; it allowed the recollection of the interview experience and for the researcher to understand the narratives. During this process of reviewing and reading the transcript's brief notetaking of the experiences, striking observations and comments took place.

Step 2 – Initial Noting

The initial notetaking is the examination of comments, content, and language identified. This stage is essential and time-consuming as it involves reviewing steps one and two of the transcripts. During this stage, based on a discussion with the researcher's supervisory team, it was agreed that the transcript would be transferred or copied into Microsoft Excel. Next, the interview questions were placed into columns, followed by appropriate responses in rows based on respondents.

At this stage, the focus was identifying important or interesting data, colour-coded by highlighting. This is referred to as the transformation or data reduction step that involves editing or making decisions on relevant or irrelevant data (Cohen et al., 2013, p. 77). The researcher was able to make adequate notes on areas such as experiences, processes, qualifications, and roles. The research was able to identify patterns, connections, and differences and engage in analytic dialogue with the script. An example of the table is included in the Appendices. The information was coded, and comments were made, which was necessary for the follow-up steps of thematic analysis.

Stage 3 - Developing Emergent Themes

The third and fourth steps deal with themes and the process of thematic analysis. This involves coding, generating themes, reviewing, defining, and naming themes for interpretation and analysis. The process is not prescriptive in developing emergent themes and depends on useful data (Cohen et al., 2013, p. 77).

The Microsoft Excel grid produced in the previous step of highlighted responses was placed on a new Excel sheet with the notes and comments. The grid was reviewed, and the various themes were highlighted and labelled. This grid was later printed producing multiple sheets of paper that were taped together. This was spread on the ground for viewing and further identification of themes. The identification of the themes was made through carefully examining each line of the transcript and all phrases. The process identified many themes that captured various aspects of thoughts, concepts, and language that reflected understanding. These themes were labelled and attached to the text for reference in a new Excel column. An example of the table is included in Appendices.

Step 4: Searching for connections across emergent themes.

Within step four, similar and opposing themes were compared or contrasted. This step of analysis requires that the researcher label's themes and extracts passages that have similar themes to be able to look at them together alongside passages that have the same label but are separated from the rest of the text (Cohen et al., 2013). In this stage, similar themes with identifiable characteristics were grouped and later classified. This was done by identifying and merging patterns. According to Cassidy et al. (2010), it is possible that in this step, the researcher may cluster together similar themes and use a name(s) to describe the whole or a superordinate theme; for others, an emerging theme may describe other themes, and itself become the superordinate theme (p. 264). For clarity and understanding at the end of this stage, it should be possible to illustrate how the emergent and superordinate themes have been constructed using either a table or figure (Cassidy et al., 2010).

Step 5: Moving to the Next Case

Since this research involves more than one respondent, the process continues with steps five and six involved moving to the next case and completing steps one to four by using the bracketing technique by Husserl (1982). The researcher bracketed the information revealed from the previous case. Bracketing is a methodological device of phenomenological inquiry that requires deliberate putting aside one's own belief about the phenomenon under investigation or what one already knows about the subject before and throughout the phenomenological investigation (Streubert & Carpenter, 2011). According to Smith et al. (2012), it is important to keep the IPA idiographic commitment. However, during the process, it is inevitable that the influence of the previous case will take place. However, the researcher approached each case separately and ensured that the data analysis that had previously been

undertaken was not considered during the next case. Through the methodology of “bracketing” the researcher’s own experiences, the researcher did not influence the participant’s understanding of the phenomena.

Step 6: Looking for patterns across cases.

The final step is the crucial section in which cross-analysis and interpretation of the cases take place. In this step, all the interview cases were observed by identifying the similarities and different themes. The researcher separated the cases based on principals and senior teachers/managers, and the themes from each case were placed on a table. The table was reviewed, and the themes were grouped based on principals and senior teachers. The themes were rechecked and grouped, identifying the connections and differences. The themes showed connections among the cases, which were further interpreted. There were a few themes that had an oppositional relationship that was also explored. This exercise produced many themes that were amalgamated and reduced based on the researcher’s objectives. The researcher paid keen attention to the connection between the cases, that is, ‘How does a theme in one case highlight another case, and which themes are more potent?’. At the end of this process, the statements, words, and phrases that emerged were developed into the main themes of twelve.

3.0.3 Conclusion

This chapter provided an overview of the methodology used in this research. The methods were identified with the explanation given as to the purpose and justification for the use in the research. The philosophical perspectives of the researcher and the underlying philosophical assumptions of the research were also discussed, along with the ethical considerations. This chapter also included the sampling method and selection process for the participants and details of the pilot research. The chapter concluded by reviewing the analysis method used to ensure that the data was represented fairly and consistently.

The subsequent chapter is the Findings; the information represented is derived from the methodology’s analysis procedures.

4. Findings

4.1 Introduction

This chapter presents the findings from the interviews of the twelve respondents and depicts some of their experiences, perceptions, and challenges. The interview process started with ascertaining the respondent's qualifications and teaching and work experience to understand the promotional process, expectations, and adjustment of the respondents into the role. Then, semi-structural interview questions moved from general to specific questions about the respondent's personal experience from teaching to leadership within the secondary school. The questions were asked with an interview guide but are presented within the chapter based on the major themes identified. This chapter has been divided into five sections to reflect the key findings of the transitional experiences of the respondents. This section includes the preparation for roles, the experiences of the respondents, training, development process and reflection of respondents.

The information is presented through the respondents' voices by quotes, conceptual tables, and thematic arrays. The quotes have been selected to explicate the themes and represent the respondents' experiences. However, by selecting various quotes, the researcher knows that some voices may be presented more than others. As a result, the researcher tried to ensure that all voices were used where possible. Using tables and charts in qualitative research demonstrated pertinent information about the respondents for simplicity and easy recollection. One such table is the demographic and attribute table used to list salient research-related descriptors of participants' social categories (Miles et al., 2020, p.). Essentially, these methods were selected as a framing device as the use of a thematic array presents the major themes relevant to the respondent's experience. The thematic array is a visual reference and road map for preliminary review before the reader begins the complex narrative journey (Miles et al., 2020,).

4.2 Preparation for the New Role

4.2.0. Qualification of Principals and Middle Managers

The requirements and selection process for senior teachers and administrators varied. Therefore, persons employed or promoted in similar capacities may differ in qualifications and may not have the prerequisite criteria. The main qualification requirements for principalship are being a trained teacher, having a minimum of three years' experience, principal training, and a master's degree. However, the school board's approval greatly weighs this process and ultimately makes the recommendations to the Ministry of Education, Youth, and Information. Table 3 illustrates the qualifications and experiences of the principals interviewed.

For the position of principal, only a small number of the respondents applied and went through the normal selection process. However, a respondent applied at the institution in which they were the Vice Principal and went through the normal selection process. Thus, the majority of the principals were drafted by individuals affiliated with their current schools to apply for the available principal position. Indeed, the respondents applied because of the approach and were successful in their applications.

"I was on leave from my school, and I ran into somebody that I know very well. Who is a part of the governance structure at another school. And he presented the idea to me, and He said, why, have you thought about such a school? We would need somebody with your experience and your kind of approach to school leadership to help us with the restructuring of such a school." (Principal 8)

"I was asked several times, and I didn't take it up before. I decided to take it up this time because there was a need for somebody to fill a gap that was left vacant, and I am an old boy of the school; I would not have gone somewhere else so easily. I was asked to go other places too, and I didn't go." (Principal 12)

4.2.1 The Qualifications of Senior Teachers

The selection process of middle managers varied and seemed to be a subjective process. Middle managers were unable to clarify a structured process by MOEYI or their specific school. The selection process is based on the perspectives of school administrators and possibly other senior teachers/ teachers if they are part of the decision-making process. In addition, each school and

its school board may have specific internal guidelines which they follow. The majority of the middle managers were told by their outgoing supervisors/managers that they would be given the position. They were informally trained by their outgoing supervisors/managers as a form of succession. The table of the sample in the methodology summarises the qualifications and experience of the middle managers/ senior teachers interviewed.

“When the HOD was about to leave, she would have recognised that she was going to go, and it was eleven (11) of us in the department. So, she gave me a little training. It wasn't so formal either. I think she would do what you would call succession planning. She told me she wanted me to be the HOD when she left. So, she would have started allowing me to help her to mark lesson plans as you take me to class visits with her, so I must say I was encouraged in that area too.” (Middle Manager 5).

Another middle manager, a Master Teacher, followed the application and selection process in which the Jamaica Teaching Council makes the decision. In addition, it follows procedures and evaluations external to the school. Middle managers/ senior teachers believe there are necessary processes and qualifications, but tradition suggests it's based on years of experience, work ethics demonstrated, the school's culture, and grooming, among others.

“What I found is that the senior teachers seem to get seniority in terms of years of service. However, it has not always worked that way. So, the basis on which persons are chosen is more than just seniority as in years of service, but it is an observation of how the person operates in their position as a regular teacher, to see the leadership skills manifest, and how they have carried out tasks over time.” (Middle Manager 1).

“No, man! You have to do your dues. I believe in paying your dues, trusting the process, and taking that step, one step forward. It has been a long and arduous process. Because if after teaching for 18 years and being a regular classroom teacher. But there is never anything regular about it. It's just that you have to pay your dues. You have to pay your dues. You can't just sit in the classroom; Tomorrow I am going to want to be principal.” (Middle Manager 4).

4.2.2. Leadership Training Qualification

Along with a master's degree, the government mandates that school leaders, specifically principals, be certificated by the National College for Educational Leadership (NCEL). No principal received principal training by NCEL or MOEYI before being appointed; Principals

with years of experience noted that the Ministry did not offer them any principal training. The MOEYI had its challenges and deficiencies in its formative years however, all principals indicated that the 'ministry has changed', and the 'ministry is doing better and is continually changing due to its reforming and restructuring exercise.

One principal reflected, *in my time, I must say, compared to Mrs. XX's time, Mrs. XX's time, they didn't have anything, anything at all. They had to learn on their own and do their job. I have to say, because of the inefficiencies the Ministry started the task force in my time. So, you have some improvements.... But I learned a lot by seeing what Mrs. XX did, and Mrs. XXX did, and what Mrs. XXXX did.* (Principal 9)

When I started as a principal, we had some challenges. You know, but as time goes by, and people are paying more attention to research and looking at what others are doing in the world, trends, and all of that, I think my ministry has gotten much better. By the way, you have some younger people who are leading now. They are more open to ideas, creativity, and innovation. (Principal 8)

The overwhelming majority of principals were aware of NCEL and its offerings. However, most of the principals were active in their roles before NCEL and did not complete the program. Whereas they did not complete a small number of female principals have occasionally taken short seminars and training courses offered by NCEL, even recently during the pandemic.

"I started NCEL, to be honest with you. But when I started, I realized that honestly, it was wasting my time. Because these are things I had known through my experience and reading." (Principal 10)

All the principals expressed that even though they were not certified by NCEL the initiative is good. The issue is that NCEL does not offer anything for persons who have been in the system for years.

"I've nothing against it. I like the idea, and I support it. When I came to this school, they wrote to me saying that I would have to do the course before I was appointed. But when I called them, they didn't think I had to do that. They said Before I am appointed? A principal of how many years? They laughed. But I support it." (Principal 8)

The principals agreed that the initiatives of NCEL in providing educational leadership for prospective principals and principals, along with occasional seminars on leadership, is a good product for education development. However, NCEL should assess current principals to build

or tailor programs to address their deficiencies. This would be a targeted approach to training leaders similar to the Human Employment and Resource Training Trust National Training Agency (HEART/NSTA TRUST).

"When you would have started as a principal, and you'd have gone through many of your experiences you found, you find NCEL as just a refresher. For persons going and aspiring to go into the principalship, you can learn a lot from the experiences and the knowledge you would have garnered from it. But, being in the profession, NCEL necessarily doesn't teach you anything. It just, it will certify you for things that you would have already experienced. In many cases, you would have already put things in place. It was a requirement." (Principal 6)

Senior or middle managers were not required to access formal supervision or leadership training by MOEYI or the school. Most of the middle managers stated that they did not access supervisory training from the ministry before or after being appointed.

One middle manager stated: *"They didn't have any supervisory training and the training I got. The truth is that before I became a HOD, they would send me to principals' and vice-principal workshops and training, but I don't desire to be a principal. So, I, and I don't want to be those things, but the training that I would get, I would use it to train other persons, but I wouldn't say that this was something set by the ministry."* (Middle Manager 5).

Some middle managers were aware of NCEL however only a small number accessed NCEL before being appointed. A middle manager indicated that she accessed the NCEL program because she was encouraged and recommended by her past principal to help her in her quest to become a principal. She stated, *'Trust me, NCEL has warped my way of thinking, so even this whole education landscape, I don't think it's only for a person who desires leadership. Once you're in the classroom, it's a course that I think all teachers/ educators need to be a part of.'* (Middle Manager 4)

Few middle managers did not access NCEL as they had no interest in being principals or believed that certification is not necessary for principalship and that principalship is *a skill acquired through training rather than on paper*. However, a few middle managers did not know about NCEL or its offerings and heard of the entity for the first time in the interview.

4.2.3 Role Preparation Reflection

The role and function of principal and middle managers go beyond the scope of an ideal job description and the proposed qualifications. The multifaceted nature of the profession relies not only on teacher training or instructional content. It also depends on other disciplines and skills for effective results. All the principals stated that having experience or training in education and instructional development is essential for producing and motivating human capital. The position requires an educational (instructional) background for executing the main functions of the job. However, being a trained teacher does not prepare individuals for principal or senior teacher/ middle managers. Middle managers have argued that they are not adequately prepared for the position and are structured for failure. Teachers' Colleges or Universities prepare teachers for their instructional tasks. The additional responsibilities of a middle manager are learned through experience and, in some cases, mentorship or coaching.

"What you realize is that you might be a very, very good teacher, but you can be a horrible principal. So, teaching doesn't necessarily prepare you for the principalship. It doesn't fully prepare you; it just gives you an understanding of the profession. But it doesn't prepare you for the job". (Principal 6)

"I think this has started because of the teachers' colleges in Jamaica., Teachers' colleges do not provide holistic learning where the student-teachers understand that they are professionals to move up to managers. I think that when it gets to the point where principals appoint persons with positions, it's more of you've been working here for a long time, so you deserve this." (Middle Manager 3).

The developed curriculum at teachers' colleges is not designed to enhance the leadership of educational institutions. The principals have a different perspective regarding the required skills or disciplines directed to address other job function needs. Some believe that additional qualifications may not be as essential because specific skills may be natural, based on common sense, adaptability or easily learned on the job.

"Many people feel they know it all just because they have those certificates. Those certificates are just a point to push you in. But after that, it's basic, basic interpersonal skills. You can't go learn to be a principal; you have to have something in you." (Principal 9).

"One of the main roles of the principal is to provide instructional leadership, and hence, not that it's impossible but for you to adequately provide instructional leadership from day one, would require you to be somewhat a part of the system, I mean, you can acquire the skills through vicarious means. But ultimately, the rest of the things you could manage. Because you

could do the HR when you're coming in, you could do the HR and the finance part. You could probably, as I said, manage, for example, the ground staff, the office staff and so on. But in terms of the instructional leadership part of it, I do believe that you should be a part of the system.” (Principal 11)

Most respondents also stated that formal training does not adequately prepare educational leaders for their roles and functions. Respondents were asked if there were any major challenges (s) faced that no specific training/ practice could prepare. The majority of the respondents highlighted situations in which educational training could not have helped in decision-making, and as such, they had to rely on other skills. All the principals stated that they dealt with situations in which formal training could not prepare them as these situations are not in the textbook or prescribed. Essentially these related situations must be lived experiences, and there is no documented evidence or books to assist with these developed situations.

'Nothing is documented. You have to learn, and you have to experience it. You create strategies to try and deal with it.' (Principal 6)

In their reflection, training could not adequately prepare them for dealing with varied personalities, unsupportive parents, unsupportive school boards, unwelcomed school environments (difficult and combative individuals), and dealing with gang activities in schools and their associates in neighbouring communities.

One principal stated that there is no training or preparation for meeting with divided gang leaders for peace in neighbouring communities and schools, *It's just something that you have to develop on the job. And like I said, you know, as you think about your environment, as you think about survival not just for yourself, but for the school. You know, you dream up these ideas. You try your hands at some new things. Some of them work, and some don't.* Principals had to develop techniques, skills, and unconventional methods to deal with these extraordinary situations. Principals had to develop strategies for dealing with difficult staff using psychological methods. Such as discussing with the 'difficult' or 'influential' individual about changes first to get 'buy-in', in some cases having them believe they have developed the idea, listening to the individual and always remaining calm when dealing with these individuals or situations.

"What I have seen when the change involves people and when it comes to people. People don't want to change. So, when you want to implement change, you have to change their mind first. Have a discussion and give people time. So, you have to do a lot of mental education once

people understand. Then you implement that slowly and steadily. That is a better way to me." (Principal 9)

Another principal stated that when staff would make vilifying and egregious comments to get a reaction from him, he *learned how to, not necessarily turn the other cheek, but to do good to those that hate you as the Bible says and to do whatever, good to them that spitefully use you like, things like that are things that I have learned because I realized that poison and poison become even more deadly.*" (Principal 10)

Qualifications or training prepare persons for all professional situations and behaviours. One middle manager stated that training or preparation is not possible for dealing with the various personalities and emotions they supervise or monitor. Each case is different and unique, as humans are unique. There might be possible training that may assist, whether formal or informal, but *'it won't be; it won't fit or suit everyone.'* (Middle Manager 2)

Middle Managers, in their reflection, stated that apart from dealing with the varying personalities such as parents and those they supervise, there are other factors that training could not have prepared them for. Two grade coordinators stated that training could not prepare them for dealing with and examining intimate details of students' lives, such as sexual molestation issues, drugs, varying teenage issues, and family problems. In a contrasting response, another senior manager (Master Teacher) stated that she had no such challenge that she could not refer to her training. *"No, you know. I have always had my challenges, and I have always devised ways to shut down one aspect and then pick it up afterwards. But I have always tried to shelf whatever the issues are before dealing with what I have at the front burner."* (Middle Manager 4)

4.3 The Roles /Function School Leaders

The respondents did not clearly outline their role or function. Furthermore, most respondents did not receive job descriptions upon receiving the new position. Most principals did not receive any official or formal documents on their job descriptions. Some principals recall receiving their job descriptions, while others were not formally given a job description upon appointment but received it months later. Few principals stated that the roles and functions are in the Education Act 1980, which they use as a substitute guide to their job description.

Among the middle managers interviewed, very few stated that their principal and vice-principal gave them a formal job description. However, the job descriptions were received months after doing the role, and another senior manager/teacher never acquired any job description but stated that it's customary to follow the predecessor. The other middle managers were not given a formal job description upon acceptance or starting the position. In addition, two respondents from those who received there.

"But the job description is in the Code of Regulation. So, it's not that I was given something outside of that. But I worked with what was there so I could say technically....." (Principal 10)

"Yes. I had a very good governing board, a very good school board. Very knowledgeable, and we work together. You understand that I got my job description and critical success factors. You know, there were some things that the board was expecting, some deliverables, and outcomes." (Principal 8)

Administrators and middle managers who did not receive a job description demonstrated their roles by learning from others, following predecessors, and learning on the job or other methods.

"I was assured that it would be something that I could handle. As I said, having dealt with the position in acting capacity for the Head of Department that wasn't so difficult and the grade coordinator, I sat with the outgoing grade coordinator for some time. And she passed on information, but there was no formal document to say, 'Okay, these are the expectations that..., those came after. To be honest, I kept asking for the job description I have found, and I don't think it is just my school. I think it is a common theme. I found myself doing the job before I was given a real outline of what they, or a written outline of what the job involved; and a lot of the job I learned on the job." (Middle Manager 1).

"No, you know. Those formal... You know what is interesting about Jamaica, they put the horse before the cart." (Principal 9)

"Right, right. Right. No, there's was no one to say, these are your responsibilities'. No, it's almost like a tradition; like a culture. Or as things are communicated." (Middle Manager 3)

The Education Act 1980 guides the operational and administrative functions required by the MOEYI. However, although the schools are directed by the Ministry of Education, Youth and Information, each school's information leadership, responsibilities, and management are

contextual. For example, the role and function of the principal vary based on the type of school, the location, size, culture, and the governing body of the school. Likewise, the description and functions of senior teachers are different depending on the environment.

"All those bulletins that the ministry would have sent. They are descriptors. There are not prescriptions. So, what as administrators we have to do is to tweak them to match our situation." (Principal 8)

"At the primary level, it involves far more activities. You do far more activities. But on a secondary level, you do more leadership, other than you have to be involved in doing a lot of the day-to-day activities." (Principal 6)

The primary function of the principal is an instructional leader; however, the role of the principal is beyond instructional leadership. It requires and includes additional skills and talents from varying disciplines. Principalship caters collectively to all human requirements of its pupils and staff within and outside their capacity. The following excerpts highlight the nature of principalship.

"The principalship is dynamic. As I said before, it has gotten to the point where a principal must be multifaceted. There are schools such as this, where principals are called upon to manage huge budgets. A principal has to be multifaceted. A principal has to be all things for all men." (Principal 8)

"My dear, you have to be everything. You have to be the leaders of the teachers. You have to be accountable to the code, accountable to the stakeholders, interact with the ministry, and know everything you can think of. So, the people issues, and the problems keep mounting, and things go out of control. I have had to sit and counsel people. My God! Hours! To make them understand how we can go forward. So, what happens then? My work is not done, so I have to stay back and finish up, which sometimes means 7 o'clock or 8 p.m. So here, I don't stay like that because we don't have a security guard. So as soon as the alarm goes, I go. So that's about 6:30. So I have to make up, or you carry work home." (Principal 9)

The role of the principal in a public or private system is multifaceted, complex, and requires long working hours, and is contextual. It involves balancing the instructional aspect, administrative and humanistic duties to have a productive day.

"..... For example, on a Monday, I do my log entry, prep for general assembly, read correspondences, and things like that. Then I would have an assembly at 7:50-8:30. By 8:30-

9:50, I would be observing teaching and learning activities in classes. If I have meetings, that would be scheduled from 9:50-11:00. Then at 11:00-11:40, I will visit grade 12 or 13. Then at 1:20- 2:40. I'm going to revisit a few more classes, and at 2:45, I meet with parents. Well, you need to organize your day, and you need to account for it. If you notice, there are more instructional classes because that's what we do, among all the things that we do- signing cheques, having meetings- the most critical thing for a principal is to monitor and supervise teaching and learning." (Principal 8)

The nature of senior positions within the secondary institution varies, and so too, the responsibilities and the allotment may be different. For example, the number and types of senior teachers / middle managers at a school are limited by the capacity (number of students), the kind of school, and the school's location. It, therefore, means that a small school may have one senior teacher having several different senior responsibilities. In contrast, a more prominent school may split the responsibilities and appoint other middle managers to operate those tasks. This would reduce the workload and allow additional persons to be compensated. These two circumstances were evident among the middle managers of the study.

The grade coordinators/supervisor's roles and responsibilities include the pastoral and guidance care of the student level assigned. Managing teacher and student/parent relationship, supervising teachers and form teachers assigned to the grade level, administrative duties, and their instructional responsibilities. The Head of Departments oversees the department's running and supervises teachers' instructional activities. At the same time, master teachers are appointed based on demonstrating mastery in a particular subject area to train and mentor other teachers in the specific subject area.

"Um, there's pastoral care to it. The admin aspect of it is where I have to mark registers and check up on kids who are not at school or may have lost a relative. Um, check up on teachers. So, I work with several other, form teachers. I also have to supervise those people. The pastoral aspect, in a sense, looks at the child as a whole, and the child's holistic growth." (Middle Manager 2)

" In my small school, I have two senior teacher roles. I am the grade coordinator for grade nine, and I'm the Head of the department., It is my responsibility to ensure that the form teachers in charge of the grade nine students efficiently carry out their duties; duties include registration and seeing to students' needs and concerns. Ensuring that Students are functioning well in the school environment and encouraging them to grow aesthetically and academically

among other duties. It is my responsibility to see that teachers in my department are efficiently provided with the government allotment and ensure the smooth running of their subjects. I am responsible for marking the lesson plan and seeing that they are planning and carrying out the plan among other responsibilities" (Middle Manager 1).

4.3.0 Business and Management Roles

Since leadership's roles in schools are multifaceted and have changed from headmasters or simple instructional, principals have found themselves doing business functions. Respondents were asked if they believed that business courses/certifications could assist in carrying out the functions of their positions. Most of the respondents agree that the educational training provided for teachers is not adequate to facilitate the business function. The principals stated that business and management are components of their daily tasks and add value. However, they were divided on whether greater importance should be placed on these functions that include certification in the areas.

"Perhaps I should have done more subjects in the business department in my earlier years. I sometimes feel that I deprived myself of that kind of acumen. Yes, and if you were to ask me if I have some weaknesses in my practice. I would quickly say that is one of them. There are schools such as this where principals are called upon to manage huge budgets. And you have to make business decisions daily. So, at the end of the day, the quality of those decisions would have been influenced largely by the level of knowledge and expertise in that area." (Principal 8).

"Learning to read a balance sheet learning to read indicators learning to analyze, and make financial decisions, something that a normal teacher would not learn in their teacher training curriculum at college. But, if you're going to lead an institution, you're going to need that as well. You're also going to need special skills in negotiating, special people skills in communication in communication with your students". (Principal 12).

Principals with business or management acumen stated that business and management training or skill was very useful in carrying out the administrative and business activities of the school. Business and management skills are crucial for carrying out roles such as finance and management of people. The development of these skills, according to one principal, is helping in running the budget for a school of eighteen hundred (1800) pupils and two hundred (200) staff members.

One principal said that it was absolutely helpful: *"Well, absolutely. I frankly don't know how people do it without it. But a large part of the role is, first of all, you need the education background is important, right? And you know, but in addition to that, a big part of the rule is about business management"* (Principal 7).

The income streams at our school have suffered and are suffering now from the effects of COVID. Yet, we still have expenditures, and that requires business acumen. The management of accounts involves an understanding of that. But probably the biggest thing that you will need as a person in terms of business is the management of people. The administration, management, and accountability of people are skills you will learn in business rather than skills you learn as a teacher. so, you need to have those skills". (Principal 12)

Principals identify that business skills are important but recognize that they do not fulfil all functions. Few principals stated that being aware or having general knowledge of business and management skills is essential. Other skills are essential and of equal importance, but people cannot be experts. Arguably educators and administrators would not want to lose the humanistic nature of the role of the principal. However, the objectives and goals of the two disciplines are different and yield different results. Education is humanistic, dealing with minds, and sociological pedagogy, whereas business is about competitiveness, objectives, and result orientation.

'It doesn't necessarily help you one hundred per cent.' (Principal 6)

"No, I, um, no, I don't. I don't. I think that there are some things that you need to know and understand. So, I have no problems with your understanding, for example, at least basic accounting to deal with the accounting and that sort of thing. But I believe that the way the system is structured, especially for a high school principal, you have a Bursar who knows that. I don't even think that the Chief Executive Officer knows everything about finance in the corporate world. Still, at least you can read a statement to understand the implications for your company. There ought to be that, but I am seriously against the education of a principal becoming business, almost business-centred." (Principal 10).

One principal strongly disagrees with the business components as a new focus of the role.

"Because I believe that education is a humanization project, right, not a business project. I...to be honest with you, and maybe I will be out before that because I am one of the principals that resist that. To be honest with you. I.....I do not believe that the job ought to become about paper

pushing. I realized that the ministry is sometimes more interested in a good report, and a good school. And, and I because I don't see that as a good school. Certainly, one of the qualities of a good school is getting good results academically". (Principal 10).

Middle managers were also asked if they believe that business courses/certifications could assist in carrying out the functions of their positions. They argued that preparation is needed, such as courses or training in these areas that would be useful in carrying out their job functions. There are specific skills that they would not be introduced to in their training. Few senior/middle managers believe that these business and management skills are attainable through practice and experience.

"I had to learn that on my own. So, I think there are some basic templates that you must give to people when you're preparing them for the position. Teach them to write a memo. Alright, you're um, you're supposed to write a report on something/ somewhere such as an event or workshops and so, teach them. We take it for granted to say right, teachers went to teachers' college; they had to do presentations. Alright, they teach every day. But something like, you don't know how to engage an audience outside of your classroom. The last thing is to teach us how to plan, plan effectively, and execute. Nuh jus' comes with something fictitious like, give us real-life...". (Middle Manager 5).

Senior teachers agreed that managerial techniques ensure the success of the project or task. However, she implies that this management function would have been practiced and matured throughout one's experiences.

"So, you are going to put out all that you have learnt whether it is through past failures or past wins that you have amassed over the years, and you learn to put into practice. As a leader, and young managers, the first thing we manage is our classrooms on a day-to-day basis. We know what standards we set for our classrooms, our students, and everybody we come in contact with, so we know the managerial aspect and how far we want to take it to maximize on weaknesses, if there are any and to get to the strength where we want and to ensure that whatever we are doing, will come to the betterment, to be successful".(Middle Manager 4).

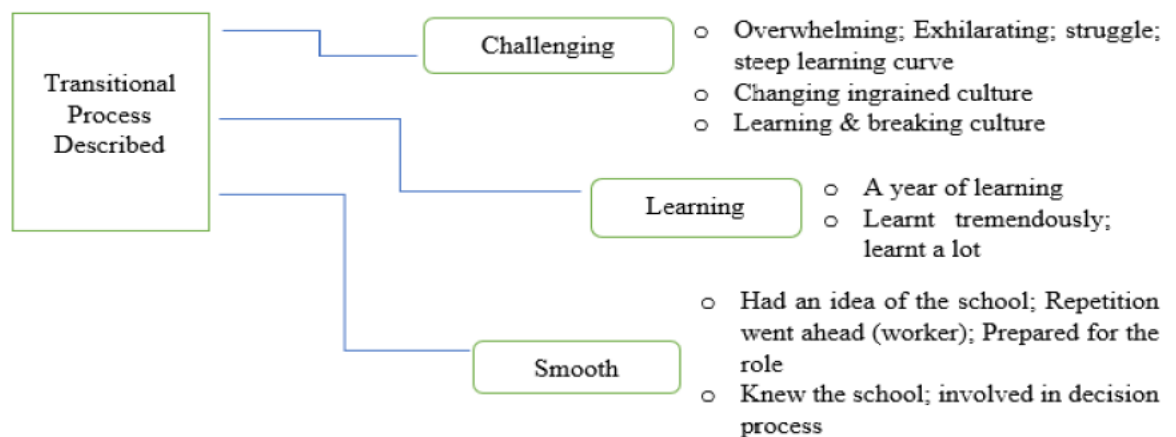
4.4 Transitional Experiences

The respondent's transitional process interlaces their experiences, indicating their challenges and perceptions of their role. The respondents were asked to use one word that describes their transitional period. While the majority were able to do so, others found it difficult to use just

one word to express the process, so they used more than one word or phrase. The following thematic array describes the transitional experiences of the respondents. The thematic array illustrates the themes identified and the expression used in association by the respondents to describe their journey.

Figure 3

Description of Principals Experiences during the Transitional Process



A thematic array that illustrates the words or phrases used to describe the transitional process of seven principals.

Figure 4

Description of Middle Managers/ Senior Teachers Experiences during the Transitional

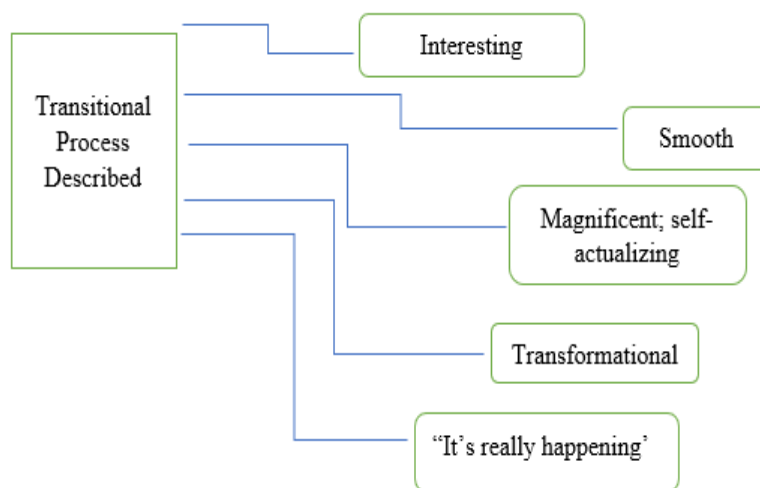


Figure 11 illustrates the words or phrases used to describe the transitional process of five senior teachers. The respondents used various words and phrases to describe their transitional experience. For example, the process was described as challenging, a learning transformational experience, smooth, interesting, self-actualization, and it's really happening. The expressions associated with the words/ phrases of the respondents are reflected below.

4.4.0 Challenging

The respondents described the transitional process as challenging as the respondents had to adjust to the school environment. That includes the physical environment, people, and the culture of the institutions. Therefore, the process was expressed as challenging as it was met with active resistance and the learning roles and functions. Three principals described their process as challenging. Senior teachers did encounter challenging moments, but these did not summate the entire experience. These principals described the process as challenging because the school community was not welcoming, especially the staff. Few principals encountered active resistance from staff, the school board, and parents. At the same time, they had to struggle with the new school environment and culture.

"It was overwhelming in one sense because it was a time with a steep learning curve. I was not the school community was not welcoming. And so it was, it was overwhelming. But then, at the same time, the challenge sort of pushed me to be better and do better and prove them wrong".
(Principal 7)

“In all cases, it was challenging. Each organization has its own culture. And going....and trying to learn the culture, break the culture, and move the organisation forward was challenging. The greatest part of the challenge is the staff that I work with.” (Principal 6)

4.4.1 Learning

The respondents experience a learning curve/ steep learning process. However, the experiences of the respondents were also expressed as transformational and interesting. This depicted and involved the overall theme of learning. The learning experience for the respondents meant learning the roles or functions of the positions promoted. Respondents had to learn the new duties, responsibilities, skills, knowledge, and understanding of personalities (staff, parents, school boards), environment and processes. As a result, the position required principals and senior teachers to be aware of recent trends and developments within the sector.

Few principals described their transition as a learning process and one middle manager described the position as interesting as this included learning about the role as being a part of the function. In addition, the process was a learning experience for the middle managers they had to balance their teaching portfolio with their new role. While another middle manager described the process as transformational as it caused changes in thinking and behaviour.

“It was a year of learning. It was a year of learning. It was, you know, and I give God thanks for my experience. So, there are many things that they would have to learn about the operations within the secondary school system that was very different.” (Principal 8)

“You get to see the different sides of the coin’. Being a part of administration gives another perception ‘when you are not leading, it is easy to criticise those who lead, and when you are leading, it is not easy to take criticism of those you are leading.’” (Middle Manager 1)

“I thought it was a fiery baptism because I was in the principal's office so often; it was uncanny. Several issues kept escalating, and I found myself missing a number of my classes. I was rather annoyed at some of them, but then I realised that there were so many needs for intervention with these girls that you were finding that there were so many that you could help and seeing different levels at which you were being called to help, and you had to be thinking things through.” (Middle Manager 1).

4.4.2 Smooth

The respondents' experiences were smooth because they were familiar with their environment (school structure) and position. On some occasions, the role was similar to previous roles in senior management or daily related work functions as a teacher. However, even though the overall transitional experiences were expressed as smooth, there were difficult situations or moments.

Few principals found the process smooth because they were familiar with their schools, had years of experience within the secondary school system, and labelled themselves as curious individuals (always a part of the system). In addition, these principals held similar positions as Heads of Departments and vice-principals at similar structured girls' schools. A few middle managers stated that the process was not difficult but smooth as the grade coordinator role was similar to the previous position of a form teacher. The grade coordinator managed the task which is commendable to one's work ethic; however, they had to adjust to the other areas of the role, such as dealing with and managing different personalities at different levels.

So, I would say my transition has been smooth. And probably, my repetition must have gone ahead of me. I don't know. Cause, I really don't have any. I didn't have any opposition even coming here I didn't have any of that. It's just that, you know, um, the only problem if I could have, I think, is maybe getting teachers up to what you want. (Respondent 9)

4.4.3 Magnificent and It's Really Happening

Promotions are celebrated as outstanding achievements in career development. A small number of middle managers shared similar perceptions of the process as '*magnificent*' and '*it's really happening*' because of the self-actualizing process. These middle managers were surprised as they were young with limited experience when promoted, which is not the norm for their school culture. Age and seniority are considered in promotion for leadership positions, and in both circumstances, other senior members were available. The role required creative methods to lead as one middle manager encountered great struggles and challenges with staff.

"Got more money. So, it was magnificent. And it came the right time. Professionally, I felt good because I was 30 years old. So, it was another it was another self-actualizing moment." (Middle Manager 3)

"Oh, it's really happening. And I would say that because um, there I was the youngest in the department. And there were other persons that weren't pleased." (Middle Manager 5).

4.5 Transitional Challenges

The challenges experienced by the respondents were caused by staff and other stakeholders, school environment(physical), culture (customs/ traditions) and lack of preparation for the position. From the interview guide, respondents were asked if they encountered any challenges between the first six and twelve months of managing human/capital resources. Most of the respondents experienced challenges managing human resources within the first year of leadership rather than financial. experienced significant challenges within the first year of leadership. Some principals were surprised at the resistance and opposition faced to their new leadership ideas, methods, or approaches. Some middle managers were also surprised, shocked, and disheartened at the treatment from fellow staff.

The challenging experiences of principals and middle managers have been placed into categories to ensure that the data is reported. The principal's experiences range from casual disagreement or resistance from personnel (staff, board, parents) to hostility. However, in most cases, students were described as easier to manage than staff. Middle managers had to negotiate the new role and develop skills to address the psychological and emotional needs of the students in which they had no training. The first year of leadership began as a *'fiery baptism'* and *"I morphed every day in somebody else's"*. Principals and middle managers encountered varied forms of resistance because staff may not have agreed with their leadership style; they were too young or believed another staff member deserved the position. Principals likewise selected outside of the school community encountered resistance from staff. Nevertheless, the staff thought deserving, qualified and senior staff members were available within the school community for the position.

The active or passive rejection by staff and stakeholders made the task difficult. In addition, both principals and middle managers experienced the issue of age discrimination or generational leadership. As a result, these leaders had to prove themselves worthy of the position and develop mechanisms to have staff cooperation. The unwillingness of staff was identified based on the following:

- the new leader was too young.
- the leader (principal) is not from the school environment (outsider)
- there are other capable/ senior staff that should be given the position.
- limited years of service

The quotes below illustrate the reasons leaders encountered challenges with staff.

So, I must have been the first principal who was that young, you know, coming in and I ended up, you know, putting two teachers to the board and firing them, and that was how the staff realised that I was serious pretty much.” (Principal 10)

“I took over from somebody who would have acted for four months, so the person was expecting that she would have been offered the post. I was the one offered. So, at first, the person really wasn't willing to assist, but after a while, they understood and really got your drive and passion....

“The second institution, the vice-principal, also applied for the post. She believed she would have been the person to have received it. And here is this lame boy, who could have been her son who came and became her principal. Her behaviour too was a shock.” (Principal 6)

Very few middle managers encountered discrimination and resistance because of their age. A middle manager (HOD) shared her first-year experience supervising older and long-serving staff as a struggle and disheartening. The department was divided, and it was challenging to get the more senior staff members to cooperate as they believed she was too young, and others deserved the position.

“So, the experience was a little disheartening at first because I would have hoped that I would get support from the seniors there.” (Middle Manager 5).

*“At one point, it felt like a sports day. Where you'd have the cheerleaders, the young ones cheering me on and then over the seniors, **them people deh a nuh inna my house**. So, it Nah go make it but um, I think what happened is the cheerleaders on my side they were so many believers, it moved from being cheerleaders to believers in who I am.” (Middle Manager 5).*

Respondents had mixed feelings on the issue of seniority as some believe that ‘seniority has its place’ (Middle Manager 1). In contrast, other mindsets have evolved and believe that promotion is based on performance and qualification.

“So, I didn't go to the position as a new teacher. So, the people with whom I was working were not new to me. I wasn't new to them. So, they didn't feel like this person came in and took over. I know the culture of the school and that kind of thing. I had predecessors who left good track records, to be fair. So, it wasn't difficult to mimic what they did, and when I ran into roadblocks, I could always go back to them.” (Middle Manager 1)

“It’s no longer years of service, it’s no longer seniority, but it’s what you do for the institution to be recognized, known, and moved from one area to grow. They are of the mindset that you shouldn’t have reached up here yet. So as a leader, I have to shelf that way of thinking, knowing how people think about me, and I have had to show them and continue to do my work.” (Middle Manager 4)

Respondents who had prior knowledge of the environment, access, or experience in the position found the adjustment to the role more manageable. The claim is that ‘*seniority has its place*’ with the advantage of knowing the various personalities, the culture and the environment of the institution or familiarity with the system, making adjustment smooth. However, they acknowledged that there were situations and circumstances that they had to resolve without prior knowledge. For example, all the middle managers encountered difficulty managing teachers because of the various personalities and resistance to the promotion. In addition, middle managers' human resource challenges include but are not limited to learning to supervise friends who are now subordinates, older colleagues, past teachers and teachers who neglect duties.

“I remember when I acted for the first six months, it was interesting because some of my closest friends were members of the department. And I was insisting on lesson plans, so much so that they wanted to wring my neck. Because their thing was, I don’t understand you, the former head of department was not so insistent because she knew the quality of teachers that she had…… I was getting the look like really; you get into the position, and you become a thorn in the flesh.” (Middle Manager 1)

Principals and middle managers mainly experienced challenges with human resources as they had limited or no financial requirements. The Ministry of Education Youth, Information, finances and supervises the school’s budget. However, the principals within secondary schools are the Chief Financial Controller of the finances, but the bursar and assistant bursar conducts the financial activities. The principal, chairman and school board do regular audits and supervise the school’s budget that the MOEYI approves. Few principals indicated that financial competence is easily attained, and deficiencies are easily spotted by ‘basic management’ or ‘common sense as *‘your credit must be more than your debit, and there must never be any red’* (Middle Manager 8). Another principal expressed that a financial challenge or financial perception encountered was the mindset of the teachers, students, and parents that the school is a ‘rich school that is financed by a rich alumina’.

Very few middle managers experienced financial challenges as their role required holding events for students such as cultural and personal development. These skills were lacking, and they found themselves teaching and learning through their experiences. A middle manager shared her experience; *“My first, my very first event; I don't remember what it was. But we went into a deficit. You know, so it was good and beautiful and all but after that, you find yourself seh you haffi a sell ice cream and do all sort of things to make sure that that the money goes back in the bursary.”* (Middle Manager 5)

4.6 School Culture

Traditions played an integral role in the challenges experienced by principals and senior teachers. Due to traditions, colleagues, parents, and the school board's resistance to change became an ingrained culture. Traditions were embedded in three factors, Ministry, school culture and the school environment. Using the three factors identified, respondents gave multiple experiences that showed cultural differences experiences based on the school environment.

Seniority qualifies for promotion was established by the patterns and customs evident in the Ministry's early dispensation. *“Historically, the Ministry has put themselves in a position that kind of causes this kind of issue within the education system because it would have appeared in the early days that being a senior teacher, or any part of management was more like a birthright or years of service reward. So that is why we had this complicated issue where if a younger person who is competent whether come in or rise through the rank and got a position, it caused a kind of mutiny among staff and so on”.* (Principal 11)

School culture sets precedents and impacts the behaviour of acceptance or rejection of staff. One principal shared her experience where members of staff and the alumni opposed her being principal. Historically, the school's principals have always been male, and the school community were not ready for that change of culture. Apart from not being prepared for a female principal, the school community was not prepared for the changes and hard managerial decisions that had to be made to improve the school's performance.

“The first year was outside of any sort of box, I could ever consider. I mean, first of all, I was not welcome, it was combative. So, for example, there was a group of very negative parents, and they would gather on the campus, as happens in many schools. They would gather on the campus and stay beyond eight and lambaste the principal, and it was not a good look. It was

not good, not good for the school. Well, the support was not there at the beginning, but I will say, at the beginning, the board unanimously decided that I was the principal they wanted. When I started to make the difficult changes throughout the year, the board had a problem. Some of them jumped, you know, jumped off the support waggon and so forth” (Principal 10).

School culture affected the operation and performance of staff. One principal stated her transition was difficult because senior teachers did not perform as leaders or integral in decision-making due to an ingrained culture. They saw themselves as and operated as teachers with more compensation; they were not made to feel or operate as managers. In addition, was the underperformance of the overall school examinations, the lack of motivation of teachers and the indiscipline of teachers was normal in that school environment.

“I recognized that there are so many things that were not in place in terms of the syllabuses, course outline, and for example, it's one of those schools where the averages of students coming in were like in the twenties and thirties, high 20s, low 30s..... But one of the things that I also had to deal with was discipline because it was a, it was, and it was staff discipline as well as student discipline; more so staff discipline, because the parents never required much; many of the teachers pretty much did anything” (Principal 10).

Where tradition and culture were not established, there was a smooth transition. For instance, one principal of a new school with new staff had supportive and hard-working middle managers. Principals who led new schools had fewer human-related or cultural issues as the staff was very cohesive and willing to work as a team. One principal reminisced of his first cohort of staff at a new institution, *“But I had a very good staff. My first cohort of senior teachers, and let me say this, none of them came to me as senior teachers. All of them were rookies. I was the one who appointed them as senior teachers in a brand-new role. So, we were all working together. But the truth is that many of them were coming from secondary schools where they would have understood the system. So, it wasn't difficult for us to knock heads together and get the school running.”* (Principal 8)

Principals who moved from school to school acknowledged that each environment has its challenges; For example, one such principal experienced a different cultural challenge at his second school promotion. *“Because what I discovered very early was that the culture that we were faced with was the inner-city culture. And clearly, it would have required a lot of love, a lot of emotional intelligence”. “You know, there are times when boys would be fighting, I mean,*

bloody fights, and I feel like I would use something and shake them. But then I remember where I am, and I know that if I were to do it, you know.” (Principal 8).

Transitioning from a private to a public institution posed cultural differences as the private sector is driven by performance that is led by good governance and management. In private institutions, performance and evaluation are vital for the success and revenue of the school. Teachers, therefore, must perform and be accountable to the institution, students, and themselves. One principal transitioning from a private to a public school realized the accountability of teachers and performance level was lower than the private.

Very few respondents described their process as smooth, and one stated that it was transformational; this includes both principals and middle managers. However, although the process was smooth, they encountered problems but saw them as general and passive. This could be because of their personalities, preparation for the role, prior experience, mentorship, or differences in school culture.

“It is challenging in any new position, however, like I said, with mentorship, with garnering all that necessary information and knowledge that you gained through training and exploration of whatever you've done, and to put them into initiatives. Because in truth and in fact, you actually are downing a new persona.” (Middle Manager 4)

4.7 The Adjustment to the New Role

In the first year of leadership, respondents had challenges due to either a lack of preparation, training and understanding of the role or inexperience with situations that arise on the job. As a result, respondents had to negotiate the role by learning on the job and leaning on various skills and mechanisms to accomplish directives.

“I am the head of Music and Art..... I found it challenging, of course, because I don't teach music and I certainly don't teach Art. I was put in a position, where I have to go and gain the knowledge of these two areas so that if my teachers are telling me foolishness, I can identify that this is foolishness.” (Middle Manager 1)

Learning on the job includes the daily administrative tasks and learning how to adjust to the new position, work culture, challenges, and the humanistic component of the profession. For principals and middle managers, learning on the job meant doing or adjusting by implementing various methods or steps. Each person's process, experience and context required the use of

different methods or steps. For example, one principal stated having entered a different educational platform of a newly built school with an inner-city gang environment, his adjustment required many methods. These included relying on the advice of expert principals (mentors), networking, the inclusion of staff in decision-making, having an open-door policy and the development of coping and soft skills to deal with the culture. However, he states that loving the job, being prepared, emotionally intelligent, continually learning, being organized, and setting a principal action plan with goals and objectives were instrumental in adjusting.

Whereas another principal stated that she had to become a manager and attend principal seminars to deal with her environment, *'I was a manager rather than a leader. It doesn't mean that I wasn't leading, but in that first year or two, it was about making sure the nuts and bolts were in place,* (Principal 10). In addition, others stated that relying on spiritual wisdom, being respectful, listening, not being fearful of anyone, always maintaining professionalism, empowering human resources, developing skills for buy-in, being current with trends and new developments, being able to multitask, not thinking about power or prestige were among the methods or steps used by principals.

The senior teachers used similar as well as other methods to adjust to their roles:

"So, it wasn't difficult to mimic what they did, and when I ran into roadblocks, I could always go back to them. And there were others as well, other senior teachers who would say, remember you have this to do. And then, and so, I was being helped along and I was keen on making sure that I did all of what there was to do. I learned what there was to learn. I was keen to say, 'How do I go about doing this? How do I accomplish that?' I had an inquiring mind because I knew that I didn't know everything." (Middle Manager 1)

A middle manager stated that the adjustment was not overwhelming due to prior experiences, familiarity with the environment, culture, and people, and previous exposure to the roles. Another middle manager used similar methods as middle manager number one, using a sense of humour, being current with trends, and providing incentives to relate to the staff, especially to change or motivate behaviour.

"I would try to read the latest trends in technology and try to connect to the new situation. The beauty about it was that I was doing my diploma at the same time, so I was doing courses like educational psychology and computer management, which was helping me at that time." (Middle Manager 3).

Time management, mentors and being prepared for the task or duties were the steps used by another middle manager to meet the demands and adjust to the new position. Whereas another middle manager states apart from mentors, other effective methods were being emotive, passionate, and empathetic towards colleagues. The middle manager credits understanding of self, networking, the collaboration of the different stakeholders, prior experiences, and knowledge as a combination of the strategies and steps used. The school environment and the situation that the middle manager experienced determined the different methods used to adjust. A middle manager admitted that she had to get tough on staff by using the code of conduct to get cooperation and reform behaviour. It was indeed challenging, but she credits her integrity and determination to succeed at her duties despite opposition.

The adjustment to the roles included implementing methods, strategies, and steps to accomplish administrative duties and staff supervision. The respondents did not discuss having issues with students or any need to implement strategies to get compliance from students. They used diverse approaches to get compliance from students. Few middle managers shared similar methods and strategies that they used to adjust such as knowing self, mentors, understanding personality(personable), and knowledge from professional development (personal).

4.7.0 Development of Skills and Practice

All the respondents firmly stated that their business and management skills developed within the first year and continue to develop during the position. The respondents have seen how their skills have developed and illustrated evidence of growth. They have attributed their development to various elements such as relying on prior experiences, training workshops, and mentorship, personal and professional development. The ability to manage, lead, relate to the ministry of education and undertake administrative duties improved as learning on the job. Since *'on the job, there's so much manual for you to use'* learning, development and coping must take place.

The table below summarizes the key findings identified as the elements that influenced development determined by the question, 'Based on recollection, what has influenced this development? Is it professional development programmes, learning from prior experiences/challenges, work environment or culture, or learning from others?'

Table 5

Factors that Influenced the Development on the Job

Respondents	Professional Development Programmes	Prior Experiences	Mentors	Personal Development	Professional Organizations	Networking	Culture	Environment
001	√	√	√	√			√	√
002		√	√				√	√
003	√	√	√	√			√	√
004	√	√	√		√	√	√	√
005		√	√	√			√	√
006	√	√	√		√		√	
007	√	√	√	√	√	√	√	√
008	√	√	√	√	√	√	√	√
009	√	√	√	√			√	
010		√		√	√		√	√
011	√	√				√	√	√
012	√	√	√	√	√		√	√

Some individuals consider their personal development to be intertwined with professional development as the professional development offered by schools caters to personal needs. Most respondents discussed being ardent readers of new trends and developments in the profession.

“What really helped me? I can remember buying two books of ASCD before I became a principal..... There were two books I had bought that I can remember right now: one, the name of it is 'On Becoming a School Leader: A Person-Centred Challenge to School Leadership', and there was another one named 'The New Principal's Field book.’” (Principal 10)

This is a practice that both principals and middle managers continue through their practice. Most principals shared that currently, they were paying attention to the news, research, and trends to address the concerns of coronavirus 2019 (COVID-19) and the educational sector. Few middle managers spoke about the importance of constant research and learning from research as a part of their development. Similarly, one principal narrates that he has read books about online teaching to prepare his staff for teaching online in September 2020; *“I wasn't so okay with online teaching. But since March 13 to now (June 11). I bought six (6) books, on online teaching.”* (Principal 10).

All respondents stated that prior experiences have contributed to their function in the role. Similarly, all respondents said that their professional background and skills have assisted in transitioning the role. Respondents identified that the formative experiences in the profession were instrumental in carrying out their duties and the respect of the colleagues they supervise. The experiences and skills harnessed during the job or other professions provided a guide that made the role less stringent, easier to communicate and forged good working relationships and problem-solving skills.

“Some of the things that I've learned I can't even tell you when I learned I know I've learned it. But it was as a result of having gone through the experience of leadership, right. It's something that just seems so second nature to you now. You know that you'll feel a little comfortable in this if you're not careful.” (Principal 10).

Learning from prior experience also includes experiences from individual life experiences and cultural backgrounds. For example, one principal attributed her success to her cosmopolitan European Education, cultural background, and Catholic discipline.

“Again, as I tell you experiences helped me a lot. My experiences growing up and coming up..... It was all Catholic, so you learn to grow according to honesty, and professionalism. (Principal 9)

The educational profession, *“it doesn't, it doesn't follow a textbook, a textbook methodology where you say 'Oh, after, after um, procedure one, yes, I will move to procedure two. After procedure two, I will do procedure three' No, it doesn't; nothing in this thing is textbook.” (Principal 11)*

Mentors and professional experts (Education Officers) are crucial because learning and training are developed by experience and expert individuals in the profession. The majority of the respondents readily identified mentors that groomed, motivated, and guided them through their new position. A few respondents did not state that mentors helped in their development but provided data that suggest that persons assisted in their development directly or indirectly by offering guidance or informal training. Most of the respondent's mentors were of similar capacity that is usually past principals and or senior teachers depending on the person's position.

“But I learnt a lot by seeing what Mrs XX did, and Mrs XXX did, and what Mrs XXXX did.” (Principal 9).

During the principal's transition, the ministry did not have training or development programmes as prevalent today. In addition, the principal recounts the relevance and guidance of the Education Officer, who guided by using objective criticism.

“She was very good and because of her I really picked up. Then of course I was evaluated, I was evaluated by the school board. Apparently, you're supposed to go through some 2 or 3. When they evaluated me, they said there was no need.” (Principal 9).

Culture and environment had a significant impact on the development and growth of respondents. The culture and environment of the institution impacted positively on the growth of the responders. Even though some responders may have entered positions where they were not welcomed and had significant challenges, those responders used the negative culture or environment as a motivator and developed solutions that developed their managerial skills and made their school successful. Few principals shared their dependency on community entities to succeed in transitioning and continual running of the school. The school community, such as parents, alumina and surrounding, does impact the transitional process. One principal shared that the surrounding communities that the students came from were volatile, and this was being demonstrated on the school compound.

The suggestions of the Ministry of Education Youth, Information to deal with these issues would create more problems and place lives in danger. The principal had to have meetings with gang leaders to develop amicable solutions. One of which is having respected gang leaders speak with those displaying gang-related feuds on the compound.

Respondents were not as keen on the implication of professional organization and networking on their development. A middle manager identified that both professional organization and networking influenced growth in the position. This middle manager school culture and environment are different as the individual was groomed and aspires to become a principal. The principals interviewed are a part of the Jamaica Association of Principals of Secondary Schools (JAPSS) and other local professional organizational bodies in Jamaica. These bodies provide mainly information, directives, or representations for members. Members have seen changes and growth in these professional groups but require more developmental tools for the profession. The principals have indicated development in their work by professional organizations such as the Association for Supervision and Curriculum Development (ASCD).

The 21st Century has seen an increasing appeal for professional development for principals and middle managers of institutions due to the lack of preparation and training. Nevertheless, there has been training and development of courses for prospective administrators or administrators. However, there has been little or no training for middle managers. For middle managers, it's customary for the role to be given with little or no training.

"I was, I was told verbally what was expected. I was called into the principal's office, given an idea of what the job would entail, and, of course, I was assured that it would be something that I could handle." (Middle Manager 1).

The position requires individuals who have an inquiring mind and are willing to learn. A middle manager narrates her experience of having to learn on the job. She is a trained teacher in the English language, and Literature and acted as Head of Department for the Language department for two non-concurring academic years before being promoted to senior teacher. She was appointed later as Head of Department of the Music and Art Department. However, having gained the knowledge and experience of supervising and doing the role of Head of Department, she had to find ways of understanding and gaining knowledge for the creative subjects that she oversaw.

So, I'm learning, I need to learn what music is supposed to involve. So, I find myself having to learn quite a bit from books and using this as tips for helping them to plan their lessons” (Middle Manager 1).

Due to the continual reforming process of the Jamaican educational sector, professional development seminars are mandated by the ministry to be held by school administrators three times for the academic year. However, middle managers and principals did indicate that the professional programs provided by the Ministry and the schools usually cater to the development of the students and the needs of the school and are not oriented toward supervisory positions. Hence, few middle managers did not believe that ministry workshops/courses/ seminars contributed significantly to their development in a supervisory role.

“We do have development sessions, but I don't think it's... it's not targeted towards grade supervisors. It's more of an academic or trying to cater for everybody, but it's not so much about leadership”. (Middle Manager 2)

The Ministry of Education, Youth and Information, and the National College for Educational Leadership (NCEL) have provided occasional seminars and workshops that have helped principals navigate the position. However, most of the respondents indicated that more targeted programs should be developed to assist with different areas of the position. A majority of respondents indicated that professional development programmes assisted in their development which included those provided within the schools, locally or overseas.

4.8 Leadership Style

The respondents overwhelmingly stated that their leadership style, skills, and qualities have transformed during the position. The process is a learning process in which years in the profession have assisted their understanding, development, and adjustment. Their leadership styles are constantly evolving and are seemingly situational based on the nature of the profession. The principals stated that their leadership style has grown and evolved from the initial stages due to the experiences, changes in the school environment, vision, and personal development. Leadership roles may differ based on the environment as principals with multiple principal experiences have identified that their leadership style varied at each school. The styles of leadership depend on the

situation or context that is needed. However, respondents were able to identify diverse approaches or dominant styles used.

“At the beginning, I would have been more managerial, not because that was my leadership style but because it was what was needed by the school community at the time. Throughout, I’ve been trying to shape leadership. So, my style is to have a participatory approach, to involve others in my decision-making, to distribute the leadership, all of that. But I had to adjust that at the very beginning because of where the school community was that we’re used to being told what to do.”

(Principal 7)

All principals interviewed have used more than one method of leadership during their tenure. However, the leadership styles mainly used are inclusive and require others' input, such as democratic, participatory, transactional, and collaborative. Admittedly depending on the situation, autocratic leadership is sometimes used to enforce action. Very few principals described their leadership style as being transformational but included using other leadership styles to get to that stage.

The middle managers did not clearly outline their leadership styles but agreed that their leadership format has grown and is continually evolving. They have learnt from their prior experiences and their trial and error. As a result, they were able to identify changes in those they supervise and how they now handle their job functions. All middle managers have described ways in which they have evolved mentally and professionally as having a different mindset and making changes that improve the quality of their staff and students. The position requires versatility and adaptability to circumstances and situations that will arise.

Educational leaders are not only dependable on the Ministry of Education, Youth and Information and their school board members but they cannot function without depending on teachers and the external community. The principals indicated the importance of having teachers be part of the school decisions or develop strategies to make teachers feel that they are part of the decision process. The transitional process is dependent on the relationship and communication between management and staff. The principals indicated that leadership must develop and motivate its staff to meet the vision and goals ultimately for the school's success. During the transition, a few principals indicated that the mindset of middle managers was the primary focus to implement change and efficiency. Having middle managers function and agree with the principals eliminates

or reduces tension, making administration stable. One principal indicates that unity is essential, and during her tenure as vice-principal, she demonstrated a unified composure with her principal even if she disagreed personally with a decision.

The management team must be included in decisions, unified, motivated, and empowered *‘The senior teachers were not, senior, and did not see themselves as managers or leaders. They saw themselves as just teachers with a little bit more responsibility and valued more pay’* (Principal 7). The principalship is a collaborative effort that includes management and the teachers as well, allowing for the merging of creative and innovative ideas. *“I find that it works because you're getting people into a situation and asking them, what do you think? And sometimes what they think may be better than you the principal...”* (Principal 9). The principals acknowledged that they had to develop an authoritative or dictatorship role. This type of leadership is needed at times; however, this does create resistance and problems. The administration must develop various techniques to deal with disagreement or opposition to decisions.

To function adequately in their new roles as leaders, principals and senior teachers had to develop skills to adjust and be efficient. Based on their experiences, the respondents were asked what skills and training educators need to deal with the current challenges of leadership within the Jamaican school system.

“So, you need to know yourself. There's a lot involved with that, understanding yourself. Do you want to be part of a job where you have to interact with people there? It's a hard question because that's not an easy one; dealing with people of different personalities... So, as you are an aspiring principal, make sure you understand what instructional leadership is. Make sure you understand what discipline is. Those kinds of things. Make sure you understand financial management to some extent, as I told you before, business management.” (Principal 8)

Principals and middle managers gave a plethora of skills needed for the profession. The principals identified skills such as understanding personalities, human resource management, business management, financial management, leadership, curriculum design & implementation, managing all stakeholders, change management and leadership. Principals must be emotionally intelligent, good listeners, open-minded, diligent, innovative, creative, visionaries, problem solvers, critical thinkers, reflective, empathize and should have a passion for the job. Other skills identified were understanding oneself, teamwork, crisis management, communication skills, strategic

management, and being an expert teacher. From the skills identified, the key skills that were common among principals' entail being passionate about the job, being visionaries, listening, being problem solvers, being reflective, understanding different personalities and being emotionally intelligent. Principalship requires financial management, instructional leadership, human resource management, management of people and developing and maintaining a good relationship with stakeholders.

The skills identified by senior teachers included understanding the myriads of personalities, human resources, and management, especially being able to manage people (emotional intelligence) and self (consistent worker). Other skills included listening, time management, teamwork, communications, conflict resolution, customer service, public speaking, and the separation of personal relationships (friendship) with professionals. Some middle managers stated that people should acquire skills in behavioural management that include psychology, counselling, and being empathetic and compassionate. A middle manager said that people should have a changed mindset, which is moving away from the 'big stick policy' mentality and allowing new ideas and collaboration from all individuals. Of the skills identified among the middle managers, five key skills were common, these are management, behavioural, time management, teamwork, and communication.

4.8 Continual Professional Development

Continual Professional Development is important for all personnel in the educational sector. It is needed for teachers, various managers, and administrators within the school. The ministry has implemented mandatory professional development seminars three times within the academic year. The ministry, at times, will prescribe the general focus of the professional development that the school will use within their context. Professional development should be targeted *'to strengthening or providing the skill sets to deal with the issues within your institution'* (Principal 11). The Ministry does have seminars or workshops from time to time. However, as stated by one principal: *"professional development that the Ministry is doing is to ensure that there is an improvement in teaching and learning. It's not about empowering the individual. It's about making sure that the school moves from point A to B. The professional organisations now need to look at the holistic development of the individual, not only to drive a school but also to empower the individual to be, to be able to even represent the organisation in all facets of its operation"*. (Principal 6)

The ministry's focus on professional development is student-centred and development of the school. A few principals suggest that the Ministry is possibly busy and has a wide area to cover. The ministry would have to review its professional development plans, and *'how they facilitate professional development as a ministry rather than being just a policymaking ministry'* (Principal 12).

There is a need for more *'sustainable, cohesive and effective professional development'* (Principal 8), that is designed to meet not only the student's needs but should be holistic development, which is an improvement of self, skillset and for professional mobility that would improve overall performance. One principal explains that along with her staff, she has implemented twenty hours of professional development per year, intending to develop teacher leaders.

"So whatever role you find yourself in life, innovate, create, be creative, find new and effective ways to do things. So, teachers ought to be developing themselves because it's, the best you can be. The best you can be is not just for delivering instruction, it's about also shaping leadership, but you can't shape leadership if you're not a leader yourself." (Principal 7)

The middle managers unanimously agreed that professional development seminars are general and student-centred. There is no seminar or workshop by the ministry or their schools promoting teacher promotion. At the end of the academic year, they do have a senior retreat for a day or more depending on the school finances, but these are centred on the needs of the school or group. The professional development by the different schools is focused on the needs of the school, students, and learning. Most of the middle managers described their professional development seminars or workshops as including personal development such as presentations on health, insurance and so on.

"We have had to as a managerial body sit and decide what our professional development would be like. So, we will have professional development that speaks to our school improvement plan, professional development that talks about the nutrition of our children and whatever programmes and initiatives we are going to put in. We have had professional development that speaks holistically to the quality of the teacher and leaders in the classroom." (Middle Manager 4).

“I don't see where the ministry has done, I'm not saying they haven't, but I have not seen it, where the ministry has mandated and seen to senior teacher training. There are programmes online but it's the individual cost or expense.” (Middle Manager 1)

There is the belief that professional development seminars or workshops are monotonous and irrelevant as they are poorly planned and not substantial.

“It's annoying, you see, mi tired of it. Because you go now and dem tell you foolishness, how to manage your classroom and when dem come to tell you how to manage your classroom or some things they tell you a white people school.” (Middle Manager 5)

In their planning of school professional development, the principals try to have a balance where the teacher will benefit personally, the students, and the school environment. Even though they try to have a balance, teacher promotion is not a part of the planning. Only a few principals have planned professional development for developing the teachers as leaders. They believe in building and pushing the staff to develop and grow professionally. These principals have a passion for developing people and building successors. One principal has had staff members who have developed and progressed to higher positions.

“I've had three principals, they were senior teachers and now they're principals and one that is a district leader in the states, he migrated. So that's how it goes. If I'm doing what I'm doing right, then you should be moving on to something else. So, it's, hurtful because you get close to them and then they leave, but that's just how it goes, and I know I'm gonna promote them and wish them well because that's how it ought to be”. (Principal 7)

The overwhelming majority of the respondents agree that leadership training is necessary. However, one principal believes that it should be personal, initiated by the individual, and the individual should be reflective and always willing to learn. Also, knowing the theory does not mean that the leader will be able to perform efficiently. He believes that leaders are built in situations and that it is easier to self-teach about leadership than to learn about teaching. This view is similar to a middle manager who stated that certification does not make an individual a principal, but principalship is acquired through training. This principal believes that the development of a principal is the primary role of a teacher that is *“I believe that you must be good at assessment, you must be good at pedagogy. You must be good at monitoring; you must be good at feedback.*

All of those things are things that I think a principal ought. You must be good at understanding how to arrange a curriculum” (Principal 8). This would be a lesson that would help prospective leaders for leadership and a good school.

CPD is essential for the principalship of the 21st Century as the world is constantly changing, and so has the educational platform. The 21st-century school does not resemble the school system ten years ago, the type of students has changed, and development in teaching aids and teaching techniques has changed, so the school leaders must facilitate these changes. This professional advancement requires more than just ministry initiatives. It includes other entities, networking and the individual’s desire and passion to know and learn how to improve their skillsets and school to meet 21st century School.

“..... Because to be a true professional, you must be involved in continuous development. Trends. I mean, education has changed, and knowledge has changes. Somebody said at least 15 times in a year, and that was a long time. Alright? So, the skills that you use to solve last year’s problems, cannot solve this year’s problems”. (Principal 8)

The 21st principal’s priority is to continually learn the new trends, ideas, and innovation as it is vital. Essentially, the principal’s professional development is the principal’s responsibility, although it may be overwhelming. The 21st-century school has many aspects and variables. One principal stated that CPD is important for principals as *I see where the 21st-century school should not only focus on the ICT or on exploring how students learn as it relates to the strategies that are used, but it must also focus on the emotional intelligence aspect of school’* (Principal 6), it on such a premise that principals should continually keep abreast with new materials and knowledge. Therefore, the leaders must be prepared for the changes to lead their teachers better. An example of change alluded to in the interviews is the COVID-19 pandemic and its effect on the changes in the teaching and learning environment. A small number of principals admitted to the fact that they had to buy books, source materials and available training to prepare themselves and staff for the new norm.

The middle managers all agreed that the educational landscape is constantly changing, and the cohort of students consistently changes. Methods and strategies must change to function in the

classroom to teach the students and to compete globally. One middle manager discussed that there are many positive and negative changes within education; thus, leaders must be prepared. The leaders should be prepared for the various issues that affect students and staff and ensure that these persons are prepared to fit into society. Leaders must be prepared for issues like drugs, homosexuality, and excessive sexuality are becoming more and more prevalent in the high school reality. A middle manager states that *“issues such as gangs and being involved with criminals, such as girls whose boyfriends are scammers, and girls whose boyfriends are active dons in different areas are realities from the days of simple fights. Also, globalisation is opening new frontiers to our students and how we teach and what we prepare them for: Are we really preparing them for, this reality or are we still preparing them for the reality that we grew up in?”* (Middle Manager 1)

Other entities are encouraged to take a more active role in continually moulding and preparing the principals to be competitive globally and lead a 21st-century school. The principals are a part of professional bodies both local and overseas, such as the Jamaica Teachers Association (JTA), Jamaica Association of Principals of Secondary Schools (JAPSS) and Association for Supervision and Curriculum Development (ASCD). Most principals are a part of ASCD, a world-known leadership professional body that is up to date on trends, ideas, techniques, materials, and globally. *“ASCD is probably the primary one in the world. keeps you on your toes about what are the developments in education, what are the changes in learning, what the rest of the world is thinking, what your colleagues are thinking and tools”.* (Principal 12)

4.9 Post Transition -Reflection

Respondents were asked to reflect on their transition and state what they would have done differently in retrospect. The responses varied, a few middle managers stated that they would have furthered their studies by doing a Master's degree or investing in oneself by taking business and leadership courses and handling situations differently. While others stated that they would have handled specific situations differently. One admitted that he would have represented a previous situation differently between his grade level and his subject area. By separating his role as a teacher and middle manager as grade coordinator when dealing with coordinator issues. He stated *“When*

I had a meeting with the students who were accused of stealing the exam paper, I, in the meeting, behaved more of an IT teacher than the grade coordinator. I was upset because my reputation was being tarnished. I was being accused by a student in the capacity of a teacher. Looking back, I should have maintained the role of grade coordinator, and not be biased but be impartial” (Middle Manager 3). Another middle manager stated she would have been more understanding with her subordinates and not take everything so personally. She learnt that an opposer who made her job difficult was dealing with personal issues and directed their anger and frustration at her. Also, the middle manager stated detail detailed documentation is key and wished that she had known this at the beginning of her tenure.

“What, I would have done differently, which is something that I learned over time, would be just proper documentation. Like I learned over time document everything. I learnt after the fact, I got into some altercation, with one of the seniors again. And she was very rude, but I didn't have anything written”. (Middle Manager 5)

The principals also gave varying responses to areas of their transitions that they would have done differently. Very few principals stated that they would not have done anything differently. Specifically, one principal said confidently that she would not have done anything differently because she was prepared for the role. While another principal stated that he likes the dynamics of life and that learning from mistakes are lesson learnt. A few principals also said they would have enrolled in principal seminars, workshops, and business courses like those currently available for prospective principals. One stated that he would have stayed longer at his first school, made more changes, and worked through the challenges; however, he has no regrets. He admits that he might have been impatient; *‘I think I was a little impatient because I think I am... I'm kind of a perfectionist about the curriculum and learning.’* (Principal 10)

Similarly, another principal stated that he should have been firmer in his decision-making at times, *‘because I was so considerate of person's feelings, I might not have allowed things to work the way they should have worked’* (Middle Manager 6). He also stated that probably, he probably would not have chosen the profession. Finally, another principal said that he would have implemented a succession plan and delegated previous responsibilities and duties in moving into the position from the same school.

4.10 Conclusion

In this chapter, the lived experiences of the respondents were shared based on the themes identified. The findings illustrated various patterns among the respondents' lived experiences that are recorded through their narratives. For example, a few described the respondent's transitional experiences as smooth; however, it was challenging for most respondents with overwhelming yet valuable lessons.

The findings highlighted the behavioural interaction between management and the school community, especially staff. That is the behaviour/ reaction of the new school community to new leadership and management. This interaction led to the development of the new leader or manager in their professional and personal role, whether consciously or unconsciously.

The movement from one role to another provided a learning experience that required the development of skills and methods for adjusting to the new position. From the experiential process, respondents developed their leadership skills on the job as the role and function of the position are developed daily based on experience. However, they admitted that the role requires the assistance of mentors, networking and continuing professional and personal development.

The respondent's reflection and evaluation of the transitional experience are indicated in the chapter, which is formulated through reflection based on the procedure of selection and their transitional experiences. The procedure is shown in the findings through selected respondents' narratives based on the process of selection or requirement for the position. This provided a qualification description of the respondents and the selected personnel's academic or training readiness for the position. The findings identified limited respondents' preparation for the new position and years of experience as common for movement.

5. Discussion

5.1 Introduction

The purpose of this qualitative phenomenological research was to explore the perceptions and challenges of educators as they transitioned into managerial roles in the secondary school system in Jamaica. This chapter will discuss the research findings based on the interpretation of knowledge discovered and the significance of this to the education sector. The findings of this research and the literature have aided in the development of a conceptual model for educators transitioning into school management. This conceptual model is significant as it aims at reducing the challenges of the transition of school leaders in the Jamaican secondary school systems and has been developed from an evidence-based perspective.

The chapter begins with an introduction to the conceptual model. This is followed by a guided discussion of what has been created, the literature and the findings used to develop the model, and how each phase and step fosters a smoother transition of educators to managerial roles. Describing and discussing the conceptual model is ongoing throughout the chapter to ensure an understanding of how it was developed, how it may be implemented in theory and practice and how it might be used in future research.

The chapter further provides an understanding of the importance of the research, compares its outcomes to the literature reviewed, and demonstrates how the study has supported or developed these studies. In presenting the findings reference is made to the four key research questions, which are addressed in this chapter.

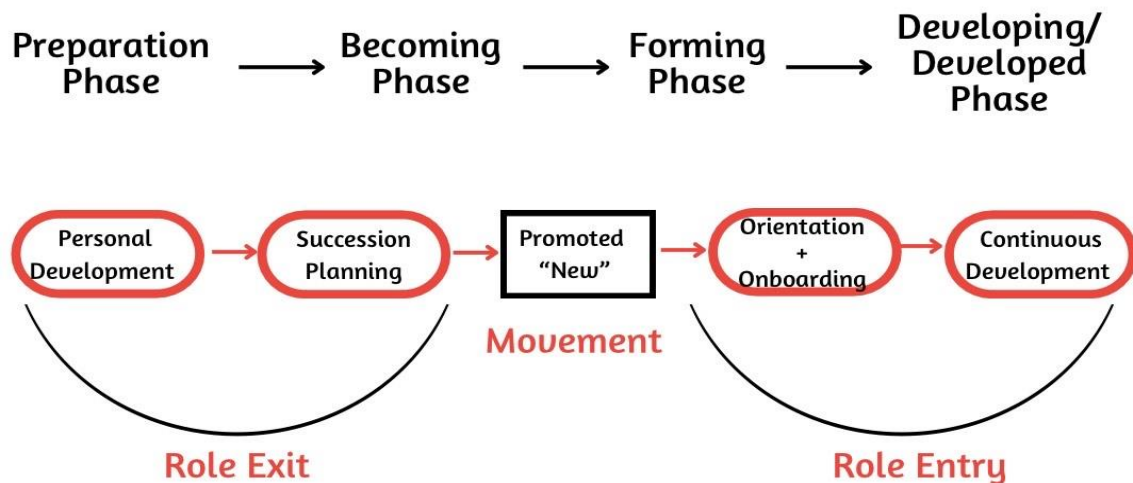
5.2 Conceptual Model for Transition

The findings provided key information that will benefit the education sector, especially the country's transformation and reform mandate. Overall, the findings indicated that the process of transition for educators to school management is both complex and emotional. The transitional process necessitates that educators be guided through the process to eliminate the challenges of the process and the poor management outcomes from schools. It is influenced by hidden and known variables such as culture, human resources (staff), and the school environment among

others that affect the transitional process. Even though educators were proficient in their technical area, they were limited by their lack of experience and knowledge in management and leadership. The data gathered and interpreted gave valuable insight that was used to develop a conceptual model to assist educators in transitioning smoothly into school management. Figure 12 provides a conceptual framework to take the reader through the various stages of transition reported by respondents.

Figure 12

Conceptual Model for Educators Transitioning in School Management

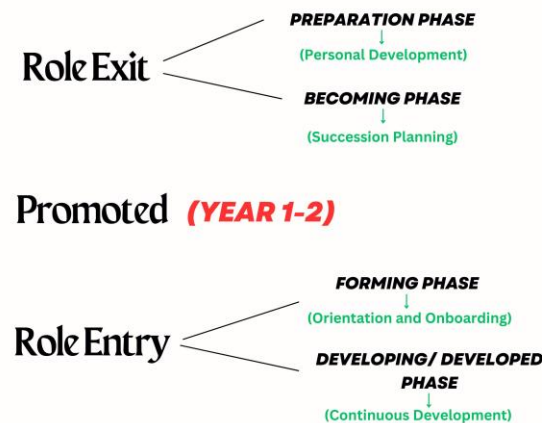


This conceptual model developed from the research findings has four key phases outlined in the top line in black. The phases are sequential moving from phase one to four. The phases are *preparation, becoming, forming, and developing/developed*. The middle line with the oblong shape represents the processes that individuals go through in each of the four phases above. For instance, the preparation phase deals with personal development and the becoming phase explains the importance of succession planning in the transitional process. The square box entitled *promoted*

new depicts the movement from the old role (*role exit*) to the new role (*role entry*) that starts the new phase *forming*. Figure 13 displays the flow of the conceptual model through its two components role exit and role entry.

Figure 13

Conceptual Model flow chart for Transitional Success



This conceptual model is a significant original contribution to knowledge that was derived from the findings. It was influenced by the seminal works of Ashforth (2008), Bridges (1979) and Hayes (2020) and extends their framework. Figures 12 and 13 show the movement from role exit (educator) to role entry (school management) adapted from Ashforth's (2008), role transitions. This involves movement between (time) ascending into a career ladder (Ashforth, 2008). The conceptual model starts with the old role (educator) ending at the role exit and beginning at the role entry (Middle Manager, Vice Principal, Principal) (Ashforth, 2008). The model is signalled by the 'movement' which is a change in a new role. The four phases show the incremental process and progress of the individual as they shift and then move (change) into the new role. The four phases will help educators begin the process and be stable in the new role which will prepare, mould, and develop an individual for school management.

The conceptual model has built on the framework by including other phases, the first phase (preparation) seeks to solve the issues identified before the actual transition into the position as identified in the findings. This was not addressed in other frameworks as their focus was the dealt with helping persons who are transitioning, thus highlighting the originality of the conceptual model. Unpreparedness based on the findings caused stress, anxiety and conflict that hindered the process and success of the Jamaican educators within the first year. Bridges (1979) and Hayes's (2020) framework influence the becoming and forming phases of the conceptual model. These two phases explain similar experiences and the process of change that are common in transition specifically work transition. Work transition is about ending and letting go of the attachment from one role to another (Leybourne, 2016; Bridges & Bridges, 2016; Hayes, 2020). Outcomes from the study established that educators had to shift their perspectives from the technical (educator) aspect of the role to learn their new management role. Consequently, the transitional process was a learning and adjustment period from one position of being to becoming for the respondents. They shifted into the role and then evolved into new ways of working and thinking. The study supports similar processes such as those identified by Howatson-Jones (2016).

However, there are components of the concept model that are not evident in any of the previous models examined. The final phase (developing/developed) is different from Bridges's (1979) and Hayes's (2020) framework as it concentrates on the changing dynamics of the role, dealing with different personalities and the trending cultures' impact on the role of school leaders. Therefore, the outcomes from this study clearly highlight the need to continually develop one's skills and practice to remain competitive as the role is always changing and adjusting with times and people. This is not identified in the frameworks identified or any transitional information mentioned and represents a specific contribution from this study. previous work suggested that adjustment to the new role and a new professional identity is formed the transition process has ended. However, outcomes from this study suggests that respondents are always adjusting to new trends, policies and educational environments and are keen in their development in the position.

5.2.0 The Preparation Phase

The change from one role to another was challenging for the respondents as they entered the role unprepared for the multifaceted functions of the job. According to Hayes (2020), the respondents were not prepared for the known and unknown variables or the complexity of transition. New

managers are not only unprepared for their new position but also underestimate the process, which Hayes (2020) calls transitional blindness. The educators admit that they were selected for the position because of their excellent skill in teaching however, this does not mean that or prepares one to be an excellent administrator. Some areas in which educators were not prepared for the position were the multifaceted nature of the role such as being a counsellor, or financial administrator. As well as the transition from peers to management, supervising older staff, change of professional identity, the long hours, and the workload. Many of the respondents were not thinking of promotion as they were approached and so mentality and academically there was no preparation of skill or practice. In fact, a few of the respondents were not qualified based on MOEYI guidelines.

The preparation phase is for educators who have a desire for school leadership or educators whose administrators have seen the potential or skills. This phase is important in getting the educator mentally and academically ready for the position. In this phase, the teacher is identifying and getting ready for the endings and losses which Bridges & Bridges (2016) term as the most significant difficulty for people in transition (p. 8). Beycioglu & Wildy (2015) in their research noted that principals valued the preparation they received and preparation bridged the gap in their transition. It is the educator's responsibility for their personal and professional development by doing the following in preparation for their prospective role.

- Reading books on school management/ leadership.
- Keeping abreast of trends in instructional design, school leadership and the education sector.
- A Master's Degree in Education Leadership or an area of study required by the governing body.
- Enrolling in the NCEL program for principals or senior management.
- Joining professional bodies and networking to beware of changes within the education sector.
- Learning from senior staff members and predecessors.
- Attending external and internal training offered geared towards promotion.

From the study and literature, these were some of the reports that help persons during their few months of transitioning. Committing to this phase will reduce the confusion in entering the new

role. Educators will enter the role with understanding, a new perspective, and a new identity. The preparation and becoming phase will eliminate transitional blindness. Understanding transitional blindness would provide a smoother transition (Hayes 2020). This understanding would be formed by doing the steps highlighted above, this would provide knowledge of the sector and valuable learning experiences from the programs and courses designed for the position. Educators moving into leadership roles would move from their intentions or agendas and have a keen understanding of the role, staff culture and environment.

A challenge in transitioning for the educators was not being prepared for the challenges with staff and the school community. Therefore, in the preparation phase, the school administration should prepare the staff and the school community for the upcoming changes. Human resources should be informed of the possible best fit for the position and a human resource plan be developed. This will eliminate conflict or resistance with the new hire and build trust. There should be transparency and standardization of the recruitment and selection policy eliminating bias and offering the most qualified and suitable person for the position. The selected person should be certified and licenced. In some schools, there should be a resocialization of culture that educators should 'pay their dues of long service before being promoted' (Middle Manager 4). The culture should be re-taught and replaced with value placed on qualifications, skills, and experience.

5.2.1 The Becoming Phase

The becoming phase is an assimilation into the desired role or the new role. In this phase, the educator is 'acting' informally in the role and is being 'nurtured' for the role. This phase is essential as the educator can have a feel of the demands of the role, an understanding of the expectations and the differences between the technical and management. This phase is implemented to reduce the psychological issues and shocks that educators endured during transitioning. The findings and literature indicate respondents' shock by the responsibilities or the workload which they had to learn and execute at the same time made the process arduous and overwhelming.

The becoming phase is shifting away from the technical aspect of the role by learning and familiarizing oneself with the prospective role. This is similar to Hayes's (2020) shifting phase from the transitional framework cycle. However, the becoming phase is different as the educator is still in their substantive role. The becoming phase allows educators to be familiar with the

institution, environment, culture and people while being nurtured in the role. Watkins et al. (2014) stated that observing and learning about allies, confederates, opposers, and fence-sitters helps in the transition process (p.3). The becoming is a practice for the educator, notable for the middle manager who will still carry their substantial role (teaching) with their new role. The middle manager in this stage is learning to balance both the teaching and management roles and is shifting into a new role and changing, unlike the principal. The senior managers have to learn, how to compartmentalize the roles. In this phase, the principal has to let go of aspects of the former role such as the old identity to form a new professional identity (Bridges & Bridge 2016).

In the becoming phase, it is recommended that administrators develop a staff succession plan. A succession plan eliminates disruption of the school year (conflicts, demotivation by staff not being selected) and outcomes for school development. Ocho et al. (2020) state that a key to transition is the initiative by management to invest in its staff to grow and develop. Managers must not just be willing to invest in themselves but in the potential successor who can be prepared to assume greater levels of responsibility within the organization (p.1361). Hargreaves (2003) states a successful and smooth transition for principalship is a principal that is groomed, an insider and with a supported culture (p.21). A staff succession plan grooms the desired staff to fill the position of middle manager or principal. It is a strategic plan and foresight that provides a continuous flow of staff that is prepared and developed for upcoming opportunities that are cultured to school. The findings indicated that informal training by supervisors or being acquainted with the role before appointment had a smoother transition than those that did not have a support system. Administrators should develop strategies for succession planning and leadership programs to assist with the difficulty and shock of transition (Spillance & Lee, 2014, p. 446).

The becoming phase does not have a period of time, it depends on the administrator. This phase could start immediately after the preparation phase or concurrently with the preparation. The phase could even take place after the selection for the position but before the actual start of the position. It may be that the educator started the preparation many years prior, but has not moved to the next phase until they have been approached for the position or selected. Whether the selected person is internal or external there should be training (acting) formal or informal before the actual appointment or start of the position. This phase ends at the beginning of the forming stage which is the start of the new role.

5.2.3 The Forming Phase

At the beginning of this phase, the educator will dissolve or bracket the old role and form or merge into the new role. At this phase, there is a forming of self, professional identity, and new approaches and practices. The forming phase is the ending of the old role and a fresh beginning in the new role. In this phase, the educator is competent, comfortable, knowledgeable, and familiar with the role which they have entered.

However, in this new role, the educator has to adjust to and fit in the role. The literature and findings identified that a key support system is essential for success in transition such as mentors, predecessors, and professional networks. Over time, educators evolve and change as their transition and adjustment take place between six and twelve months. This gave them adequate time, experience, and reflection to adjust (in-between) and become more proficient in articulating and enacting professional identity, which is consistent with findings elsewhere (Campanini et al., 2012, p. 33). The following are the guidelines for the forming phase:

- The forming phase duration is between six and twelve months.
- The institution should develop an orientation and onboarding plan.
- Middle managers and Principals should join professional communities.

Orientation should involve the discussion of the job description and expected outcomes. This will be used as guidelines for the role and provide focus and clarity of the position. Whereas the onboarding plan should include a formal mentor program. There are formal mentor programs of principals that have yielded success in European countries and areas of the United States (Cassavant & Cherkowski, 2001, p. 75). A mentorship program is keen for the development of skills, team building, improvement in leadership, problem-solving and sharing wisdom (Ocho et al., 2020; Suplee, 2009). Middle managers and principals should also join professional bodies or groups, as networking is keen for the development of skills and an authoritative source of information.

5.2.4 The Developing/ Developed Phase

This phase is a continuous process that takes place as change is constant and those within the education sector must be kept abreast with new policies, procedures, global changes, and trends.

The findings indicated that the middle managers and principals stated that their leadership styles and skills are constantly evolving due to the nature of the job dealing with various personalities and changing times and policies.

The respondents recognized that various programs, short courses, and workshops were helpful in their development and navigating the challenges within the profession. They all recognized the value of continual professional development in the 21st Century. Therefore, school leaders should ensure that each year they attend at least two professional-development programs. CPD is recognized as a necessary part of professional responsibility, and accountability that ensures improvement and development in one's profession (Day, 1999; O'sullivan, 2011; Chikari et al., 2015). This helps school leaders to develop the skills and practice needed to improve their practice, staff, and students. In terms of transition, it is key for further promotion in the sector as school leaders would be prepared to transition to other schools, educational transformational committees, or areas in the MOEYI thereby improving the sector.

5.3 Research Questions

The research was underpinned by the following research questions which following data collection and analysis were used to present the study outcomes and develop the conceptual model. The four research questions were:

- What are the experiences and perceptions faced by educators who are transitioning into management positions?
- What challenges did educators face during the transition period and what are the strategies used to function proficiently in the new roles?
- How do educators handle career development while modelling professional and occupational identity?
- What are the key solutions and recommendations for educators transitioning into managerial roles?

RQ 1: What are the experiences and perceptions faced by educators who are transitioning into management positions?

The research questions were answered through dialogue with respondents from the interview guide. Respondents were asked to describe their experiences and challenges through open-ended questions (See Appendix 1). The findings indicated that the selection of teachers for school management seems to be based on seniority and the perception that seniority prepares an individual for the role of principalship. The perception is that those who are selected for the position are the most qualified and are prepared due to their long service. However, most of the respondents were not prepared for the role as they realized the role was overwhelming due to lack of preparation. This outcome supports other research where the technical role did not adequately prepare managers or leaders for their new roles in management (Hayes, 2020; Bridges & Bridges, 2016; Ocho et al., 2020). School leaders are expected to be hybridized managers, yet their leadership and management skills are overlooked (Hayes, 2020). Like hybrid managers, school leaders have acquired skills during the transition by sifting through Hayes's (2020) levels of tiers. The learning curve for the respondents was particularly challenging because of lack of preparation, having to learn on the job, and lack of foresight and understanding of the institution and staff.

The educator's instructional skills did not prepare them for the role of school management. This made the transition difficult as they did not have the skills and resources needed to effectively do their new role. The respondents overwhelmingly stated that these positions require training and preparation in other disciplines such as business, management, leading and counselling. Their inadequacies or weaknesses are attributed to a lack of knowledge in business and management acumen along with others. Respondents stated that they had many roles some of which Spillance and Lee (2014) identified in their study such as social workers, engineers, police, and lawyers p.450).

Few respondents stated although business and management skills are helpful in the daily activities of school management and leadership these are basic skills, and they are easily developed over time by personal/ professional development and learning on the job. Although educational leadership is likened to business the primary function of the profession or sector is instructional and humanistic. Findings indicate that school leaders should have a balance of instructional and

business management skills among others such as counselling. The technical skill of the profession has to be amalgamated with new managerial skills (Evans, 2019; Montgomery, 2019).

The outcome of the research identified that the recruitment and selection for the position were subjective as most of the respondents for principal were approached to apply for the position and then awarded the position. This is in line with the findings of Miller (2014) whose findings indicated that qualified and experienced teachers were being passed over for appointments to a post of principal, not due to any perceived lack in terms of their qualifications or experience, but due to an endemic culture of corruption in Jamaica. According to Miller (2013), this was demonstrated by political affiliation, religious affiliation, interference, and social connections. For the position of principal, the requirements are at least 10 years of teaching experience, a Master's Degree and Certification by NCEL. However, in this research, most of the principals were not certified by NCEL. Some, however, had opted not to do the certification and have been excused. The main requirements used are the 'invisible hand' (internal networking), being a certified teacher, years of experience and a previous position as a senior teacher/ manager. However, the outcomes of this research support other researchers who suggest the three requirements above do not adequately prepare principals for the changing role of principals (Beycioglu & Wildy, 2015; Miller, 2015; Ocho et al., 2020).

Another outcome was that middle managers could not identify any formal procedures or application procedures for their roles. In most cases, they were nominated for the position by the principal and School Board and did not know the selection until appointed. They were awarded the position as members of the school community and believe that they are competent with years of service to carry out additional responsibilities. However, there were a few notable exceptions of persons with three years of experience being promoted to senior teacher exceeding those that are senior in years; in the case of this research, those persons had a master's degree. Most of the senior teachers shared that they were ineffective during the transition and were not prepared for their roles or duties as there were no available training programmes and, in most cases, did not fully understand their role until after a year. Middle managers stated that this made their experience overwhelming and challenging. Middle managers and principals were further placed at a disadvantage in their role as in most cases they were not provided with a job description to guide

them in their new roles. Mower (2017) outlines the importance of job descriptions that help in transitions and role identity. The few respondents who received a job description did so some months after starting the position. This made respondents feel incompetent and unprepared for the dynamics of the new role and the expectations of having to balance administrative duties, leadership, management, and humanistic duties.

RQ 2: What challenges did educators face during the transition period and what are the strategies used to function proficiently in the new roles?

Several of the respondents described their challenges in their new role as a ‘shock,’ overwhelming, struggle, isolating and stressful. The outcomes of this research support other studies where principals encountered similar challenges such as managing budgets, staff resistance, ineffective staff, a large volume of administrative tasks, and leading and managing people (Spillance & Lee, 2014; Daresh & Arrowsmith, 2020). Most of the challenges identified were managing, adjusting, and leading human resources (Gentry et al., 2014). In the literature identified and this research principals and senior teachers were ‘shocked’ by the responsibilities and workload. Respondents found their roles challenging due to their multifaceted nature such as management, childcare, nursing, and engineering, among others. Their roles or duties had extremely long hours isolating, and unpredictable as no day or situation is similar. Few of the respondents who described the process as smooth had informal training or had a support system as discussed by Ocho et al. (2020).

The principals were familiar with the NCEL program and its purpose. However, only a few enrolled with fewer completing the Principal Certification Programme. Some discontinued or did not enrol because the information delivered was the same as what they had learned during their own transitional experience. In line with the findings of Smith (2015) participants who were not in post for some time did report that they needed to upgrade their skills and competencies, particularly in the context of developments in the modernised education system, new national priorities and newly delegated responsibilities are a target group for leadership development.

The very few principals that completed the Principal Certification Program did so as a requirement dictated by their School Board upon acceptance of the position. Even, though most did not take part in the program all have encouraged their senior teachers to participate or enrol in short professional development programmes or workshops and seminars offered. NCEL offers

certification programs also for middle managers, However, most of the senior teachers were not aware of the program and as such did not participate. The respondent, who was aware of and enrolled in the NCEL program was encouraged by the principal/ mentor after which the individual was awarded, a senior manager. Senior teachers are not required to have formal supervision or leadership training. The results indicate a reluctance of principals to enrol in NCEL programs because they are already knowledgeable of the position and such requirement is not enforced. Some respondents were not formally prepared for the position, and this may be the reason for the shock of the role. However, respondents who had training still emphasized that they still encountered challenges.

Respondents also shared challenges that they believed training could not prepare them for, such as dealing with the personal details of staff or students. They had to rely on prior experiences, prior knowledge, intuition, and mentors, among others. Formal training for the role does not prove that there would be fewer challenges. It does provide preparation for the role and would have individuals aware of the multi-dimensional function. These research findings indicated that a combination of training, advanced preparation, mentorship, acting, and strategic planning allowed successful transitioning as likened to Ocho et al. (2020).

Respondents agreed and believed that Continual Professional Development (CPD) is advantageous for the development of skills and practice. However, they suggested that the formal professional development mandated by the MOEYI is often too general and not specific enough to meet their development and role needs. Middle managers stated that these programmes were not well planned, they were monotonous, not substantial, irrelevant, and not targeted to supervisors or management. As a result, many of the respondents relied on other programs or methods to improve their practice. In addition, it should be reiterated that a successful professional development outcome depends on a thoughtfully planned and well-implemented plan (Guskey & Yoon, 2009; Moss et al., 1994). Principals and middle managers who have been in the sector for ten or more years stated that the implementation of professional development seminars and workshops is a new concept in the profession. Principals did not have workshops to inform, guide or explain their roles and duties and relied extensively on mentors or their predecessors until the restructuring of the sector in the 20th century. This is a likely reason for the poor planning and administration of CPD programs.

The issue of age and years of service is an ingrained hidden culture for the progression of a leadership role within the sector. The most qualified may not be selected and if selected, however, there may be opposition from staff and the school community. A proportionate number of the sample senior teachers and principals encountered transitional challenges as they were labelled young for the position. Respondents had difficulty leading older staff members, many of whom were disrespected and made the new school leader's duties extremely difficult. Bushardt et al. (2018) agree that the supervision of a younger generation of an older generation may be overwhelming and cause challenges in the transition. The young senior teachers who were appointed saw it as a great achievement but regarded it as a learning process, a struggle and disheartening experience that they overcame. These situations showed that those identified as competent, qualified, and hardworking however because they did not fit the tradition of the school community, they endured passive or active resistance.

The respondents all identified various skills that they believed leaders should possess to function efficiently in school management. Respondents identified a variety of business and management skills. The following are frequent skills used as strategies such as emotional intelligence, understanding self, conflict resolution, listening, time management, multi-tasking, teamwork, crisis management and communication skills. Importantly leaders must exemplify hard work and good work ethics so that employees can emulate and respect authority thereby promoting good work relationships. These skills among others helped in the transition to the new role and getting buy-in from staff. The skills that were developed during the transition are time management, organization, multi-tasking, research, and being creative and innovative in dealing the human resources. Respondents stated that the most difficult process and adjustment was dealing with teachers. Learning on the job has led to the development of unconventional methods and coping skills used to solve problems, conflicts, or issues with people.

All respondents in this study used various leadership styles strategically based on situations and past experiences (Spillance & Lee, 2014). They identified a mixture of styles used during the transition are autocratic, managerial, instructional, transactional, collaboration and transformational based on experiences encountered. At the beginning of the transition, the respondents had to demonstrate leadership of authority and management that is they that they were the leaders; they had to be autocratic in their leadership and gradually inclusive. Similar tactics of

authority were used by others, however. they levered with identified stakeholders or personnel that had influence. These influencers are usually the ones that would oppose individuals with the ability to persuade other stakeholders. The influencers are used as a 'buy-in mechanism' to the new leadership or plans. For this reason, Cassavant & Cherkowski (2001) and others shared a need for CPD to deal with daily realities through seminars and workshops.

Respondents used or created a leadership atmosphere of inclusion/participation. Principals stated that collaboration or participation leadership with the inclusion of influencers allows for a smoother transition and running of the school. All the principals stated that teachers are more willing to accept changes, be unified, and implement changes if they feel included or are included in decisions. Collaboration or participative leadership allows staff bonding, reduces administrative and personnel tension and eases the pressures on school principals or leaders. This is because people are likely to implement decisions in which they have participated in relation to their work activities.

RQ 3: How do educators handle career development while modelling professional and occupational identity?

My research findings indicate that educators handle career development through role identity, training on the job and continual professional development. To deal with the dynamic experiences and challenges educational leaders had to manoeuvre the transitional space by also implementing coping skills and strategies. The level of the new role or position caused a shift of perspectives, and the working relationship the way of thinking. This initiated the understanding and development of self in a new role. For example, at the beginning of the transition, senior teachers had difficulty catering to the psychological and emotional needs of the students which they encountered daily. They also found it difficult to manage their relationships with colleagues moving from friendship to supervisor. However, role identity and understanding of their role caused a transitional shift in which respondents gave examples of becoming the role or 'morphed' into the role.

Respondents gave instances in which they decided how they wanted to be viewed in the role, and the changes or impact they want to make or fulfil in their position as they are downing a new persona. Literature states that new managers often believe that a new position requires a new persona or new 'self' that requires a different attitude. Findings from this study indicated that some

respondents wanted to make an impact while others wanted to be different from their predecessors. The pressure of the school environment, community and personal goals also made the transition difficult. The internal and external school community is observing, evaluating, scrutinizing, and judging of performance and results. The principals and senior teachers approach the position as “dressing to be addressed” and so new leaders adjust ‘self’ on the assumption of the position and expectation (Austin & Carnochan, 2020; Owens, 2019). While this is a good idea this attitude is a reason for the challenges encountered during the transition (Hayes, 2020).

In modelling, their professional identity respondents made errors during the transitional space by not taking the time to understand the space and self by deconstructing and reconstructing thinking and perspectives. However, new managers should not dress the role on themselves before taking the time to learn the organizational culture and observe the transitional space (Hayes, 2020). The respondents were familiar with the organizational culture, structure, and the sector of the schools for the new position. As such no time was taken to understand the position from the perspective of the new role and was preconceived. All the senior teachers were promoted within the same school and started their positions immediately conducting what was expected or observed emulating predecessors. The transitional period is an unknown context and evolving process and requires a period of shifting and adjusting (Hayes, 2020; Bridges & Bridges, 2016). The lack of time invested in understanding and working with the complexities of the transitional space creates problems however this created a learning experience of role for respondents.

The respondents who took the time to understand the school environment and listen to their staff before implementing changes did not encounter staff resistance but had difficulty with the volume of the work. This research identified that principals who had previous experience in principalship transitioned differently than their first experience as they paid keen attention to understanding their environment, the employees, and the school community. Emphasis was placed on building relationships and trust by listening and learning the various personalities and the problems they had with previous management. They solve the problem by incorporating collaborative leadership. Having staff involved in the process or having the staff believe that they are valued provided a smoother transition and planned focus. This did not eliminate all challenges, but they recognized the difference in their transitions due to spending time to get to know the culture and environment. The transition may also have been different because of experience in the position, school maturity

and educational attainment. Research indicates being unaware of the unseen variables creates a narrow focus and fosters problems (Hayes, 2020; Campanini, Frost, & Staffan, 2012).

All respondents indicated that they had to learn on the job as they were not formally prepared for the position. Principals and senior teachers had to learn and handle moving from peers to management with the duties of managing, directing, and delegating (Gentry et al., 2014). The school environment is fostered by situational or experiential learning, trial and error, reliance on prior knowledge, learning from others and organizational culture. Positive or negative experiences were used as motivation to develop the respondent's managerial and leadership skills. Becker & Bish (2017) state the importance of a holistic approach to management development that goes beyond formal training and embraces other ways of learning through experience and engagement on the job and with other people. Within the education sector, it has been customary for management and leaders to follow guidelines given, observations of former predecessors, experiences (experiential learning), direct and indirect mentors, coaching and self-reliance mechanisms. Similarly, principals and senior teachers learnt from their predecessors and their predecessors also learnt on the job. Most of the respondents stated that mentors groomed, motivated and guided them during the transition. Becker and Bish (2017) stated similar findings in their research that the management skills of their respondents were developed by their daily work-related duties and interactions. They also found that respondents learnt and improved their skills via trial and error, learning from others, particularly when these individuals have more knowledge and experience (mentors and coaches) and learning from those in a similar position (Becker & Bish, 2017).

Before 2007, there was no formal requirement for teachers to continue or improve their learning once they received their teaching qualifications, resulting in a teaching force with the majority being college-trained as opposed to university-trained (National Education Task Force, 2009). It is on such premise that the MOEYI have implemented compulsory professional development seminars three times per year for its teachers and principals. All the respondents believe that both corporate and personal professional development is important and should be exercised. Professional development programmes for educators are a strategy for strengthening educators, improving performance levels, and increasing students' performance (Mizell, 2010).

Day (1999) argues that professional development consists of all-natural learning experiences and those conscious and planned activities that are intended to be of direct or indirect benefit to the individual or group. Based on such premise, senior teachers were engaged in professional development through informal coaching, mentorship, reading, research, observation, senior meetings, and mentoring. This research identifies these as methods the educators used to understand their role and improve practice. Whereas these are significant and commendable they are not consistent nor have expert implementation and evaluation. Most of the respondents catered to their professional development through personal investment through reading courses and seminars. Very few principals believe that professional development for leadership should be facilitated by the school. This they believe should be done individually by enhancing one's craft.

Becker and Bish (2017) state that although informal learning can be a powerful means of management development, it requires explicit attention in the design stages to ensure the full benefit and learning opportunities are realised. CPD is the reflection of practice, to build, maintain, and enhance knowledge, expertise, and professional competence throughout one's career (Day, 1999; O'sullivan, 2011). The reflective practice is important because if shared among others this will build and cause a shift in practice. Both principals and senior teachers acknowledge the importance of reflective practice and state that more should be done to enhance the school system to meet the 21st school. This cycle of continuous and reflective learning ensures that educators are constantly working to become more effective in addressing the problems identified. Skills would develop and be adopted forming new best practices, and success can spread throughout the school and even from school to school (Mizell, 2010).

Few principals take the initiative to plan senior management professional development to develop or enhance leadership skills in their schools. The principals that planned senior management professional development are visionaries or transformational leaders. They believe in the growth and upliftment of staff and have a passion for developing people and building successors. The MOEYI provided annual workshops or seminars for new principals, vice-principals, or school boards to sensitize and assist in conducting their functions and duties.

Participants who were Principals from this research stated that professional groups have played a significant role in the development practice. There are no specific professional leadership groups for senior teachers at any level of the sector except the general body for teachers. However, there

are professional groups local and overseas for principals and vice-principals such as the Jamaica Association of Principals of Secondary Schools and the Association for Supervision and Curriculum Development that the principals are engaged in. The findings indicate that senior teachers and their roles are not valued as management and are still catered to as additional responsibilities even though the role has evolved.

RQ4: What are the key solutions and recommendations for educators transitioning into managerial roles?

The following solutions and recommendations were identified through dialogue with the respondents and the literature reviewed.

Developing and implementing a recruiting and selection plan would provide the most qualified or the best fit for the principal position. This would eliminate a few challenges during the transition process and improve school performance. Mower (2017) and Ocho, et al. (2020) agree that the promotion criteria, requirement, and approval process are important for efficient school management. The removal of multi-practice and decisions by school boards and the ministry would eliminate a few of the transitional challenges. Having a formalized structure for the selection of senior teachers within the school would help in structuring the appointment process. A formalized system ensures there is an understanding of the role and provides standards for promotion and succession planning (Ocho, et al., 2020). Spillance & Lee (2014) recommend developing succession strategies to eliminate the transition shock to the new environment and this would have principals being prepared with the criteria needed. Beycioglu & Wildy (2015) suggests that academics, principal preparation programmes, and internship/job experience provide quality leadership and transition experience.

A few respondents stated that Teachers' Colleges or Educational training programmes should develop curricula to sensitize and educate teachers about business and management. All respondents believe that CPD is important and that enrolling in professional development programs geared toward personal professional development is essential for transitioning. The principals recommend that new and aspiring principals enrol in NCEL because it is a good programme that will assist in transitioning and understanding administrative tasks. It eliminates a few of the trials and errors and is established to improve the quality of leaders. Principal programmes offer preparation for effective leadership as principals are tasked with establishing a

collective vision for improvement and leading innovation, student learning and achievement. Whether systemic or localised, improvements require multiple-level investments in time, finance, and human resources (Miller, 2015). Experienced principals believe that NCEL should assess current principals and develop a program tailored to the current problems. However, NCEL does offer an Effective Principals' Training Programme designed to keep principals abreast of the latest developments in school leadership. The experienced principals interviewed did not mention this programme. The principal who enrolled in this program was recommended by their school board.

The principals have recommended the inclusion of staff in decision-making, and the principals have indicated a development of trust and teamwork among staff that fosters productivity. Ensuring that senior teachers are treated as managers and decision-makers in their department or school development allows for growth and readiness for the promotion of principal. These principals were also proponents of the development of skills of their staff and self. They are constantly enrolling in different courses local or overseas to influence their teacher's craft and their leadership skills in 21st-century schools.

The key research questions have been explored in terms of the outcomes of the research. The conceptual model has been presented which was developed from the outcomes of the research. This clearly indicated how this study has not only supported previous models but has created a new conceptual model. The key contributions to theory and practice are presented below.

5.4 Contribution to Practice

This research provides a practice outcome that may be applied by MOEYI for educators through policy. This may also be implemented or used as a guide for educators who are transitioning or have a desire for school leadership and management. The research provides the challenges and strategies that were used by respondents to navigate the transitional process. It provides recommended solutions from the respondents and literature that educators can use to improve their transitional process. The development of the conceptual model with the guidelines is a contribution to practice and theory that may be implemented as a framework for the successful transition in secondary school. This will guide practice on the promotion and development of educators to school management. It provides a theoretical feature which can be used by educators going through the transitional process to reflect on their stage of development, consider the process and put in

place the four phases to achieve the knowledge and skills required to confidently carry out their role as a member of the management team of their institution.

5.5 Contribution to Theory

The conceptual model contributes knowledge to the previous frameworks on transition such as Bridges (1979) and Hayes (2020). The model is an extension of the previous frameworks as it focuses on the process before the transition or the readiness (preparation phase) and the development of the individual (developed phase). The model includes methods or guides that will help in the transitioning process at each phase. This research provides a detailed understanding of the perspective of principals and middle manager's approach to transition in Jamaica. There were a few similar challenges, however, the ways in which educators were selected for their position created challenges for the start of the transition that differ from other studies. Essential most of the challenges experienced by the respondents were specific to school cultures such as seniority, garrison behaviour, staff resistance, and corruptive practices of recruitment and selection. Educators transitioning into managerial roles must observe and understand the school culture before they implement any changes. Importantly, many of the schools are influenced by internal and external variables that managers should learn about before transition. The respondents' transitional experiences and challenges were similar to those identified in other studies except for the impact of culture. Very limited research has been done on the transitional process in education or the process of Jamaican educators.

5.6 Conclusion

This discussion chapter presented the interpretation and explanation of the study findings. The key findings of research questions and literature aided in creating a conceptual model for transition in school management in secondary schools in Jamaica. The conceptual model has four phases preparation, becoming, forming, and developing/ developed that was developed based on the understanding of the transitional experiences and challenges of the respondents. This conceptual model caters to the challenges and problems identified and provides a solution that should improve practice in the sector. This chapter contributes to knowledge for policymakers, school administrators, educators and researchers of the transition process and provides guidelines for the

Jamaican context. The following chapter provides recommendations for transition in the education sector and avenues for further research.

6. Conclusion and Recommendations

6.1 Introduction

The purpose of this chapter is to present the conclusions of the research and to provide key recommendations for the improvement of the transition of educators to school management in Jamaica.

6.2 Conclusion

This research aimed to explore the perception and challenges of educators as they transition into school management. The research questions provided substantial information on the experiences, perceptions, and challenges of the respondents. The findings indicated that most respondents' transitional process was challenging and overwhelming. This led to the poor performance of the respondents during the first year of leadership. However, the respondents all stated that they improved in their roles and responsibilities after the first year. The themes identified from the research were unpreparedness, learning on the job, lack of training, seniority, and challenges. The first year was difficult as many were unprepared for the role and all the respondents had to learn on the job. Many of the respondents had no training for the new role and had problems adjusting to a new culture in a new environment. The transitional process of the respondents was also emotional as few struggled with an understanding of self, that is identity of the new self as they morph and act in the new role. They had to act in the role until they felt they understood what the role was or until they were formed into the role. Conflict was not absent from the process as middle managers and principals encountered both passive and active resistance from staff and the school community among others.

A key theme identified from the research was unpreparedness, those that were unprepared had a difficult transition. For instance, some senior managers stated they were not given a job description, they had to learn their role. However, the very few respondents who had a smooth transition did so because they took the time to work alongside the outgoing middle manager or principal as well, they were accustomed to the role through previous acting positions. Preparation is important in the transitional process as Hayes (2020) points out that persons moving into a new position should not just focus on the known variables. They should take the time to learn and identify the hidden variables, to prevent transitional blindness (Hayes, 2020). Preparation means

learning about the role, having a job description, and having a plan (succession plan) of action to move forward (Mower, 2017; Ocho et al., 2020).

The key theme preparation formed the basis for the developed conceptual model to guide educators through the challenges of the becoming and forming phases of the transitional process thereby improving practice. This conceptual model seeks to guide educators academically and emotionally through the process. The four-phase conceptual model, preparing, becoming, forming, and developing was developed from the research findings and supported literature on transition. The conceptual model provided guidelines that will create a conducive, efficient, and efficient work environment and improve the practice and outcomes of schools. The conceptual model contributes to work transitional frameworks. It also contributes to the development of leadership and management practice individually or as a group through the MOEYI that may implement this model through policy or its current reform measures. This will facilitate the desired outcome for secondary schools, that is a pass by the NEI in areas of leadership and management. With the implementation of the conceptual model, leadership and management would be strengthened and continually developing.

6.3 Strengths & Limitations of Research

The strength of this research is the process and procedures which were used to conduct it. This research explored the transitional process of educators who have moved into management positions. The design and approach employed rely on the respondents' views, experiences, and perspectives. The voices and stories of the respondents provide 'rich data' that is, multiple viewpoints on a single data set. Therefore, the aim is to understand the process and by making sense of the respondents' experiences. These experiences of the respondents provided the necessary information needed to form concepts or theories that cannot be done through experiments or quantitative methods. Moreover, the use of a qualitative design allowed a level of understanding and knowledge that would not have been contributed to this field of knowledge.

Few challenges were encountered in conducting this research. Firstly, acquiring the necessary respondents proved difficult as most persons were working from home due to COVID-19. Therefore, contacting and speaking to possible participants at their offices were futile. The researcher had to rely on acquaintances, strangers, and colleagues to make initial contact with

potential participants for interviews. Following the acceptance by participants to participate in an interview, the process was smooth.

It is recognized that the researcher was an insider and as such, there was potential for bias. However, following a strict research process, preparing for the role of a researcher, and recognizing my philosophical stance and that of the research design that I chose to employ all mitigated against a biased perspective in as much as possible.

6.4 Recommendations

Eight key recommendations are presented below that the MOEYI and/or secondary school leaders may implement to address other findings associated with transition such as policies and practices. The focus of the recommendations is on key areas that the government would be able to attempt at this time.

Training for School Management

School leaders (administrators, school boards) should be trained in the promotion of their new role by the central unit MOEYI. However, principals and senior managers should be in charge management, conflict resolution and human resource management yearly on international standards and trends. Training outcomes should be monitored and evaluated, and certification given for the training.

Standardized Recruitment

The recruitment and selection process should be standardized and enforced by the MOEYI for administration (principalship and senior managers). This would ensure that the most qualified and best candidate is selected for the position, eliminating bias. The MOEYI should not approve employment unless all the criteria have been met.

Job descriptions

Most principals were approached, and senior managers were chosen for the position and were not familiar with the details of the role. Therefore, job descriptions should be given at the appointment of the new role that is updated to reflect the 21st-century school. This is to ensure that those

appointments are aware of their work task and do not have to rely on the Education Act of 1980 or predecessors,

Committee /Council to regulate School Leadership

The establishment of a central unit for school leadership would regulate and monitor the policies implemented by the MOEYI. This unit would manage all administrative stakeholders such as school boards, principals, vice-principals, and senior teachers. Currently, there is an established teacher's council to regulate and develop the teaching profession. Principals and Vice principals have professional associations for principals for representation and decision-making, however, there are no such associations for senior teachers.

The National College for Educational Leadership

This is indeed a good initiative by the Ministry of Education, Youth, and Information. This entity would be more effective in its mandate and course offerings if it is aligned with the school leader's regulatory system. The ministry has mandated that all principals should be certified by NCEL, however, this is not the case. An entity with the responsibility of enforcing and regulating the recruitment process would have all administrators certified. Vice principals and senior teachers are not mandated to do this program or be certified. It is recommended that senior staff be certified. This certification may have to be free or at a reduced cost to have current senior staff enrolled. All applicants must have NCEL certification, a national professional qualification or have completed a principal training program.

NCEL should also update its course offering to meet the needs of the school leaders, international standards, and educational trends.

Preparation for Leadership

The preparation for principalship/ school leadership should take place as early as the Teacher's college or undergraduate degree program. Educators should be exposed to business and management courses at Tertiary Institutions. Undergraduate teaching programs should expose teachers' areas such as Human Resource Management, Business and Management and to other skills such as budgeting, event planning and reporting writing.

These are skills that are needed not only at the senior level but also as teachers with responsibilities such as form teacher. This would enhance and develop the skills of educators that will improve delivery in the classroom and operations of the school. This would also foster creativity and innovation.

Succession Planning

Succession planning by a few principals proved to be strategic and effective leadership. This ensures long-term planning and sustainability of school goals. Leadership should not be focused on seniority or years of experience but based on talent and potential. School leaders should develop, nurture, and implement opportunities so that team members can have opportunities to experience and learn about leadership. There are various methods and ways of doing this such as coaching, mentoring, shadowing, giving teachers opportunities to work on significant projects, and managing resources and time.

Professional Development and Advancement

Currently, schools have Professional Development Committees, these committees should plan, conduct, monitor and assess professional development. Professional development should be planned and focused on the needs of the school, educators and administrators and not just instructional development. Professional development should be ongoing as the schools should allot more time or hours for professional advancement and not just school outcomes. Other local entities such as professional associations or private partners should offer professional development programs not only for educators but also for school leaders or aspiring school leaders that are specific through workshops/ seminars based on their research and monitoring system.

6.5 Future Research

The findings of this research provide information that may be used for future research. This research may help further the academic body of knowledge and to provide further clarity on the transitions. This research may be further developed by including a larger sample group such as primary or tertiary education in the form of a survey that may confirm this research outcomes. Also, since research on transitioning in education is lacking in the Caribbean a comparative study

with another island may be done to ascertain if the experiences and challenges are similar or different.

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Appendices

Appendix A- Semi- Structured Interview Questions for Principals

Demographic questions

1. How long have you been/were employed by the Ministry of Education?
 - Year of Employment
 - Institution(s) Employed.
2. As an educator what subject(s) did you teach?
3. For the position as educator, what are the required qualifications?
 - Did you have these upon employment?
4. Did you apply or were you appointed in your current position?
5. What year were you appointed principal?
6. What are the requisite qualifications to become a principal position?
 - Do you have these? If so, when were they acquired?
7. Give a general description of your role.
8. What was/ were the previous position(s) held within the sector before principalship?

Experiential questions

9. What do you think about the required qualification(s) used to fill the managerial position within the school?
 - Do you think business courses/ certification could assist in carrying out the functions of the position?
10. Do you have one word that maybe used to describe your transition?
11. Talk me through what you remember of your overall experiences of your first few months of transitioning into your new role of Principal?

12. Based on your recollection of the first six (6) months as principals do believe that you developed your business and management skills. If so, how?
 - What methods /steps were used to adjust into your new role?
13. Have your leadership style developed/ transformed during your tenure?
 - Based on recollection, what has influenced this development? Is it professional development programmes, learning from prior experiences/ challenges, learning from others principals, work environment or culture?
14. Did you encounter any challenges between the first six (6) - twelve (12) months as principal based on managing your human/capital resources?
15. In reflection is there any major challenge(s) faced that no specific training/ practice could prepare you for?

Training

16. Has your professional background/ professional skills been helpful in your transitioning or in carrying out your role(s). If so, How?
17. Did you have any training prior or during your tenure as Principal? How has the following prepared or moulded you to meet the demands of the 21st century principal:
 - The Ministry of Education
 - Professional Development Programmes
18. What skills and training do educators need to deal with the current challenges of leadership within the Jamaican school system?
19. You are aware of the National College for Educational Leadership and its role in Jamaica. Did you seek assistance from this entity before or during your tenure? If so, when and why? If not, why not?
20. What is your opinion on Continual Professional Development (CPD) within the educational sector? Is it mostly centred on teacher- student development rather than teacher promotion. Is this a possible reason for the poor performance of school administration?

21. What is the role of CPD for professional advancement for principalship in the 21st century?
22. In reflection, is there anything you would have done differently during your transition?
What and Why?

Appendix B - Semi- Structured Interview Questions for Senior Teachers

Demographic questions

1. How long have you been / were employed by the Ministry of Education?

- Year of Employment
- Institution(s) Employed
- 2. What subject(s) do you teach?
- 3. For the position as educator, what are the required qualifications?
 - Did you have these upon employment?
- 4. Did you apply for or were you appointed to your current position?
- 5. What year were you appointed HOD/ Supervisor?
- 6. What are the requisite qualifications upon for your current position?
 - Do you have these? If so, when were they acquired?
- 7. Give a general description of your role.
 - Did you receive a job description?
- 8. What was/ were the previous position(s) held within the sector before appointment?

Experiential questions

- 9. What do you think about the required qualification(s) used to fill the managerial position within the school?
 - Do you think business courses/ certification could assist in carrying out the functions of the position?
- 10. Do you have one word that maybe used to describe your transition?
- 11. Talk me through what you remember of your overall experiences of your first few months of transitioning into your new role?
- 12. Based on your recollection of the first six (6) months as HOD/ Supervisor do believe that you developed your business and management skills. If so, how?
 - What methods /steps were used to adjust into your new role?
- 13. Have your leadership style developed/ transformed during your tenure?
 - Based on recollection, what has influenced this development? Is it professional development programmes, learning from prior experiences/ challenges, learning from others, work environment or culture?
- 14. Did you encounter any challenges between the first six (6) - twelve (12) months as HOD/ Supervisor based on managing your human/capital resources?
- 15. In reflection is there any major challenge(s) faced that no specific training/ practice could prepare you for?

Training

16. Has your professional background/ professional skills been helpful in your transitioning or in carrying out your role(s). If so, How?
17. Did you have any training prior or during your tenure as HOD/ Supervisor? How has the following prepared or moulded you to meet the demands of the 21st century school:
 - The Ministry of Education
 - Professional Development Programmes
18. What skills and training do educators need to deal with the current challenges of leadership within the Jamaican school system?
19. You are aware of the National College for Educational Leadership and its role in Jamaica. Did you seek assistance from this entity before or during your tenure? If so, when and why? If not, why not?
20. What is your opinion on Continual Professional Development (CPD) within the educational sector? Is mostly centred on teacher-student development rather than teacher promotion? Is this a possible reason for the poor performance of school administration?
21. What is the role of CPD for professional advancement for principalship in the 21st century?
22. In reflection, is there anything you would have done differently during your transition? What and Why?

Appendix C- Information Sheet for Participants

My name is Deana- Kay Stewart –McIntosh and I am a Postgraduate student completing my studies in the Business School at Edinburgh Napier University. As part of my research, I am undertaking a research project for my Doctoral dissertation. The title of my project is: **The Emperor’s New Clothes?! Understanding the experience of educators in their transition to school management roles in the secondary school system in Jamaica.**

This research aims to provide a model to support educational reform in Jamaica by providing steps and procedures to improve administrators’ standards, provide greater accountability, transparency and school improvement and effective outcome by administrators. This research requires the participation of volunteer principals, vice principals and Heads of Department. There are no specific criteria other than to be a principal or vice principal within a public school in Jamaica. If you agree to participate in the research, you will be asked to participate in an interview at your convenience. The whole procedure should take no longer than 60 minutes. You will be free to withdraw from the research at any stage, and you will not be required to give a reason for doing so.

All data will be anonymised as much as possible. Your name will be replaced with a participant number or a pseudonym, and it will not be possible for you to be identified in any reporting of the data gathered. All data collected will be kept in a password encrypted file on the researcher’s computer to which only the researcher has access. This will be kept till the end of the examination process, following which all data that could identify you will be destroyed.

The results may be published in a journal, presented at a conference, or presented to the Ministry of Education as guidance for Administration reform.

If you would like to contact an independent person, who knows about this research, you are welcome to contact Dr. Janice McMillian, Senior lecturer/ Supervisor of this research. She may be contacted at [REDACTED]. If you have read and understood this information sheet, any questions you had have been answered, and you would like to be a participant in the research, please now see the consent form attached.

Appendix D- Edinburgh Napier University Research Consent Form

Edinburgh Napier University requires that all persons who participate in research studies give their written consent to do so. Please read the following, tick your response and sign it if you agree with the following statements.

1. I freely and voluntarily consent to be a participant in the research project on the topic of the perception and challenges of educators' transition into leadership conducted by Deana-Kay Stewart-McIntosh, who is a postgraduate student at Edinburgh Napier University.

YES ☐ NO ☐

2. The broad goal of this research is to explore the perceptions and the challenges faced by educators as they transition into leadership and to provide methods or recommendations or discussions of the content of professional development for potential principals/vice principals/HODs. Specifically, I have been asked to give information from my experiences through interview, which should take no longer than 60 minutes to complete.

YES ☐ NO ☐

3. I have been told that my responses will be anonymised. My name will not be linked with the research materials, and I will not be identified or identifiable in any report subsequently produced by the researcher. I understand that my words may be quoted in publications, reports, web pages, and other research outputs, but my name will not be used.

YES ☐ NO ☐

4. I also understand that if at any time during the interview I feel unable or unwilling to continue, I am free to leave. That is, my participation in this research is completely voluntary, and I may withdraw from it without negative consequences and I will not be asked any questions about why I no longer want to take part.

YES ☐ NO ☐

5. In addition, should I not wish to answer any particular question or questions, I am free to decline.

YES ☐ NO ☐

6. I have been given the opportunity to ask questions regarding the interview and my questions have been answered to my satisfaction.

YES ☐ NO ☐

7. I have read and understand the above and consent to participate in this research. My signature is not a waiver of any legal rights. Furthermore, I understand that I will be able to keep a copy of the informed consent form for my records.

YES ☐ NO ☐

Participant's Signature

Date

I have explained and defined in detail the research procedure in which the respondent has consented to participate. Furthermore, I will retain one copy of the informed consent form for my records.

Researcher's Signature Date

Appendix E- Excel Thematic Grid of Principles

12. Based on your recollection of the first six (6) months as principals do believe that you developed your business and management skills. If so, how?

	A	B	C	D	E
2 Questions Interview					
3 DEMOGRAPHIC					
4 1. How long have you been / were employed by the Ministry of Education?		25 years. It's really going on 26 years	26 years	21 years	21 years
5 Year of Employment					
Institution(s) Employed					

Appendix F: Sample of Analysis of cross patterning themes

Appendix G: Additional Demographic of Respondents' Transition

Table A1

Additional Demographic of Respondents Transitional Experiences and Challenges

	ID #	Motivation for Administration	Transitional Experience	Main Challenges During Transition	Response to the Challenges
	001	<ul style="list-style-type: none"> I was, I was told verbally what was expected. I was called into the principal's office, given an idea of what the job would entail, and, of course, I assured that it would be something that I could handle 	<ul style="list-style-type: none"> It was interesting. I, um, you get to see the different sides of the coin. And, um, it was interesting because when your predecessor is still there to see you take up the position he or she held, you are inclined to make an extra effort to say you have not failed, or, in any way, lessened the quality of what was done. As a matter of fact, well, for me, I wanted to supersede what I was left with, the legacy that I was left in both areas; both as coordinator and as head of department. And so, I had the advantage, the advantage of having seen what they did, and having had enough exposure to make sure I take the good and try to add my own bit to it to make it better. As to whether or not I have succeeded as yet, I'm not going to be, that is not up for discussion. 	<ul style="list-style-type: none"> I thought it was a fiery baptism because I was in the principal's office so often, it was uncanny. There were a number of issues that kept escalating and I found myself missing a number of my classes, and I was rather annoyed at some of them, but then I realised that there were so many needs for intervention with these girls, that you were finding that there were so many that you could help, and seeing different levels at which you were being called to help, and you had to be thinking things through. So again, I go back to your course thing because yes, when you are trained just to teach ,and yes, you will come up on incidents, but there are so many times when 	<ul style="list-style-type: none"> So, but it went well, because I think I can, I think I'm a people person, so they knew that, and they were supportive. Right. Okay, for me, one of the things that I made sure that I did, was that I did not make any requirements that I was not willing to do. I think that's one of the things that mess up people. I didn't go to the position as a new teacher. So the people with whom I was working were not new to me. I wasn't new to them, so they were willing to work with me. And I know the culture of the school and that kind of thing. So all of those, as I said that I had just returned from, for the head of department, I just returned from having been

			<p>But I would like to think that I had an advantage.</p> <ul style="list-style-type: none"> I can always, I can always go back to the person for suggestions, which I have done by the way, and, and to seek help and guidance, and it was freely given. I also call it interesting because when you are not leading, it is easy to criticise those who lead, and when you are leading, it is not easy to take criticism of those you are leading. And so I call it interesting, because when you're seeing the different sides of the coin, it's not necessarily personal, but I've seen people who have criticised the very position that they have now come to occupy, and the very same things that they criticise about, are things that they are being found guilty of. 	<p>you are being called to go to a level where you are, you are being asked to examine some intimate details in children's lives that you would not have been exposed to prior to this kind of thing. So it is...</p> <p>I remember when I acted for the first six months, it was interesting because some of my closest friends are members of the department. And I was insisting on lesson plans, so much so that they wanted to wring my neck. Because their thing was, 'I don't understand you, the former head of department was not so insistent because she knew the quality of teachers that she had'. And I said, well, and to make matters worse, I had just returned from having done my postgraduate diploma. And so I was, I was coming back out of this system where I was trained about the importance of lesson planning. And so I was on top of that and they wanted to wring my neck; that was an adjustment for them. I was insistent, there were... one of the things I was so keen on is making sure that I followed up; if I said I was going to do something, I was going to do it.</p> <ul style="list-style-type: none"> And, um, it, like any newbie, where I suppose, if you're new to the system, you're so, you know, bright eyed and bushy tailed and want to 	<p>taught how to fulfil, all of the demands and so I was implementing a lot of what I was taught. Also, as I said, I had people; I had predecessors who left good track records to be fair. So, it wasn't difficult to mimic what they did, and when I ran into roadblocks, I could always go back to them,</p> <ul style="list-style-type: none"> And there were others as well, your other senior teachers who would say, XXX, remember you have this to do. XXX, remember that is there to do'. And then, and so, I was being helped along and I was keen on making sure that I did all of what there was to do. I learned what there was to learn. I was keen to say, 'How do I go about doing this? How do I accomplish that?'. I had an inquiring mind, because I knew that I didn't know everything. And when my teachers, I gave them free room to speak and they spoke and when they advised or when they criticised, I took the criticism seriously, tried to better it and so for me, I think that helped.
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				<p>make sure that everything is done from marking people's lesson plans on time and getting them back and say, 'Boy, you could have fixed this and that', I was getting the look like 'Really, you get into the position and you become a thorn in the flesh'. But that was important as well, and by the way, some of these teachers would have been teaching there long before me. So, it was an adjustment for them as well. So, but it went well, because I think I can, I think I'm a people person, so they knew that and they were supportive. So that made it easier.</p>	
002	<ul style="list-style-type: none">I was appointed. I was... the offer was made and I accepted.	<ul style="list-style-type: none">Most of what I'm doing now, I used to do before because I was a form teacher. So, I have been a form teacher for several years. So some of the things, so the only difference was maybe, um, the management part of your peers, working with your peers at a different level. Um so it wasn't a difficult transition and given the type of person I am; the workload	<ul style="list-style-type: none">Dealing with parents. Yeah. I've had only one situation... where I had a difficult parent. Everybody you know, but you know, each person is unique, so you won't have... yes, there are certain things that you can be trained about, but it won't be, it won't fit or suit everyone.	<ul style="list-style-type: none">I think also because I had good mentors, so I was prepared. I had an idea of what to expect, and so I would have done some preparation in anticipation of September. I would have also met with the students and parents before September.I think preparation. It demands a lot of time. I certainly had to manage my time properly because I thought I was good at that.	

			<p>wasn't so much of an issue because I get my work done.</p> <ul style="list-style-type: none">• (And so, you, your transition sounds as if it was smooth, especially because you said that you had that prior experience of being a form teacher, as well as you had mentors that were able to assist you.)• Yes. Um, September morning, somewhat because I would have had some preparation before. We had orientation. I would have prepared some stuff so that September morning things would flow. Um, what was the September morning like? September morning was pretty much normal, I think.		<p>But then based on the things that were needed, the demands, I had to really manage my time and then try and separate it from home, not let it get too much where I'm taking it home and so on. So I think time management preparation was a big thing.</p> <ul style="list-style-type: none">• We do have development sessions but I don't think it's... it's not targeted towards grade supervisors. It's more of an academic or trying to cater for everybody, but it's not so much about leadership. Um, I think we've had one or at the end of the year when we meet as a group and I look back at the year and I will probably talk about other things, but that was just my first year. We also meet weekly so I think... but that's not like a training session or personal development thing.
003	<ul style="list-style-type: none">• Appointment by the principal. Mr. XXX had voted me as technology coordinator which should've been a senior teacher position.• I've seen all the teachers have been competent. So I think that there is a process. I think	<ul style="list-style-type: none">• Magnificent. All right. I have to say, it's not just, they're so many factors. When I go from a regular teacher to a senior teacher or to a supervisory position. You have more money. Yes. Got more money. So, it was	<ul style="list-style-type: none">• So, here's where my personality came in now. So, to speak to teachers, I watched the other, the other grade coordinators, or other coordinators. Because I was a staff supervisor before. So, I would have senior teachers in	<ul style="list-style-type: none">• Right. So, my, so I was able to take on that role and make it mine• Right. Um, so with students, I try to be real with them. I tell them, 'Come and tell me anything you want, just nuh cuss bad word. I'm good.	

		<p>the administrator, well, principal administrator; let me be politically correct. The administrators, either for want of seeing something beyond the moment- I look at you and say, 'oh, you can probably do it; let me give you a chance', and if you happen that every time you receive a chance, it works out. Or, the teacher themselves, because of years of experience.</p>	<p>magnificent. And it came the right time.</p> <ul style="list-style-type: none"> • Ahmm Professionally. I felt good because I was 30 years old. • So [REDACTED] and I'm in charge of, um, nine teachers who are older than I am. Some would have taught me. I am in charge of the grade 11 cohort. • [REDACTED]. And I don't look my age. These children are going to think that me and them 'a size'. I would now have to when you say morph. Yeah. I morphed every day in somebody's else. 	<p>charge of me. There are other grade coordinators- 7,8,9,10,11- I mean -12,13. As a matter of fact, there were two coordinators, me and a female for grade 11. So, when I watched them, I said to myself, I was not going to be a traditional grade coordinator who walks in the morning and says 'Boy, go to your class'. First thing as a male, I cannot see when a girl has in a hair piece. I cannot see. Or I cannot tell that your uniform is not three inches below your knee. I cannot, I just cannot tell.</p> <ul style="list-style-type: none"> • I'm a liberal conservative. Number one, Yes, we're gonna follow the rules. We won't break the rules. Rules are made or were made for particular situations. So, I tend to deal with students individually and not generally based on the rules. 	<ul style="list-style-type: none"> • I improved my customer service skills. I have a friend who trains for TPDco customer service well, it's again my life is just so... God is good to me, because she and I are friends. I said to myself that I cannot be such good friends with this lady, and I have terrible customer service training, so I had to learn from her informally. It's comfortable being this type of person for both students and parents who come around me and my coworkers. • Learning from prior experiences. So, because of that, now, as I grew in teaching, I became more of a manager and I'm gonna tie it in with others. • I did two programmes while working- my Masters and my diploma. So those, I would say, aided me. Because I got my Masters in Education, and I watched videos and I saw American style teaching, I had that one thousand percent. I like this. I remember specifically, there's a book called 'Habits', the course is called 'Habits of Mind'.
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004	<ul style="list-style-type: none"> • I was appointed to the senior level two years ago. (2018) • Master Teacher-well It was one of my senior teachers who was past acting Principal who made the recommendation. • She dealt with the appointment; she submitted the relevant documents. I just had to follow through. 	<ul style="list-style-type: none"> • My transition was transformational NCEL, Trust me NCEL has warped my way of thinking, so even this whole education landscape, I don't think it's only for a person who desires leadership. Once you're in the classroom, it's a course that I think all teachers/educators need to be a part of • Like my children, we have a creed at school: 'I will not be ordinary, I will be excellent, because it can be done'. So, we try to step out of the box at all times and see how well we can rise to the occasion and go above and beyond, to ensure that we have success..... 	<ul style="list-style-type: none"> • The first six months, it was human challenges. In my first six months... up until now - (cause this is like my second year going into my third year as senior manager at my institution-) I have had colleagues, like I said or mentioned earlier, I am possibly one of the youngest members of staff. And then for persons to say 'I have been here'... they are realizing now that the landscape has shifted, the paradigm has shifted. It's no longer years of service. It's no longer seniority, but it's what you do in order for the institution to be recognized, to be known, to be moved from one area to grow. They are of the mindset that XXX shouldn't have reached up here yet. So, as a leader, I have to shelf that way of thinking, knowing how people think about me, and I have had to show them and continue to do my work. 	<ul style="list-style-type: none"> • So, no matter what the situation is, whether it's... I am bucking heads with another colleague because we have a difference in opinion. And from time to time, we have that. We try to remember, alright, XXX you're in an Emperor's New Clothes so... you have to dial it down a bit, and you have to stop, and you have to listen. You have to give the person a listening ear in here, because sometimes persons only need someone to listen them. • For you to get their point of view and to really understand, 'This is why I'm making such fuss, this is why I say or stand by what I am saying'. And we can't, we can't draw that line at the point without actually seeing the perspectives of the other person and seeing where that really goes. • It is challenging in any new position. However, like I said, with mentorship, with garnering all that necessary information and knowledge that you gained through training and exploration of whatever you've done, and you can put them into
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					<p>initiatives that you have drummed up or brought up. Because you need buy in.</p> <ul style="list-style-type: none">• Because in truth and in fact, you actually are downing a new persona.• They are of the mindset that XXX shouldn't have reached up here yet. So as a leader I have to shelf that way of thinking, knowing how people think about me, and I have had to show them and continue to do my work.• In that, like that will show them because I don't use word of mouth to show. My actions are what I use to show that this is why I am Senior Teacher, this is why I am appointed Master teacher, this is why I am standing here in front of you, this is why I am the one who is marking your lessons plans.
005	<ul style="list-style-type: none">• All right, in all honesty, my vice principal at the time, Mrs. XXX for some strange reason she always encouraged me. But it would not be a formal thing. I don't think they had a structure that would prepare me for leadership. I think she saw leadership qualities in me,	<ul style="list-style-type: none">• All right. Ah, that for me was a little struggle for a year. I wouldn't say a little struggle, it was a struggle for a whole year. And it, it, this is what I had to tell myself: 'It's either you a guh face up to this or you a guh die into this'. That was it for me but... because initially, you would have	<ul style="list-style-type: none">• I would say that because um, there, I was the youngest in the department and there were other persons that weren't pleased.• I can remember an older man. I sat with him, I had a discussion with him, and I asked him what was the reason for him not wanting to	<ul style="list-style-type: none">• I think what happened is the cheerleaders on my side were so, so much believers- it moved from being cheerleaders to believers in who I am- that it boosted me. And then like in a, I won't tell a lie, before the year ended, the seniors, they just came on the side. So that was it. That	

		<p>and she would push me and then she would give me additional responsibilities. But I found it a little strange at the time because I didn't even know that's what she was doing because we're not close. I would just go to this lady's office for things that I need or to deal with matters and she would try to ... probably slide in what we would call the 'hidden curriculum', but I don't think I was encouraged formally; that's the truth.</p>	<p>persons that felt like I shouldn't talk to them because I just started, pretty much if you know what I mean? You would have persons there that deserve this according to them and I am still young. So, the experience was a little, a little disheartening at first because I would have hoped that I would get the support from the seniors that were there. Also, on the flip, we had, like I said, it was about 12 of us at the time so the ratio would have been like half young, half seniors.</p> <ul style="list-style-type: none"> • At one point it felt like a sports day. Where you'd have the cheerleaders, the young ones cheering me on and then over the seniors- 'them people deh nuh inna my house'. 	<p>work with me. And I, it was at that point, I discovered some stuff. I didn't even recognize there were persons outside of the department that thought I was 'too much' in the sense of like, 'weh she a come bout?' and he would be with those teachers that would have been there from the inception of the school. So, him just, pretty much never have no reason fi nuh work with me beside of seh him friends dem nuh like me.</p> <ul style="list-style-type: none"> • I had to learn that on my own. So, I think there are some basic templates that you must give to people when you're preparing. Teach them to write a memo. Alright, you're um, you're supposed to write a report on somewhere, something that you went to, to an event or, you know, they send you to workshops, and so, teach them. And I find that we take it for granted to say alright, teachers went to teachers' college, they had to do presentations. Alright, they teach every day. But something like, you just don't know how to engage an audience outside of your classroom. So, if you are going to be a leader, you want 	<p>was it. Like, it's a matter of just saying, knowing who you are, knowing this is what you're doing right now. And you have some people, don't let them down; it's either 'dem a go come or dem go'. That's what made it good for me.</p> <ul style="list-style-type: none"> • My sister said to me, "I remember you sitting here and saying to me, 'You and I may not be friends, you and I may not be close, but I will always respect your office, and I will do what is expected of me as long as it's not pulling on my integrity'" and she said to me, "I respect that. I recognise that you would have done your role properly and you allowed the 11 teachers to come with you, even when you have two 'bad breed', you find a way fi mek them come". And I think that's what has... my management skill has developed over that time to deal with people well, and also to get the job done as best as possible.
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				to teach us, teach us how to engage and present to an audience outside of the classroom.	
	006	<ul style="list-style-type: none"> I was approached and then I applied because of the approach. 	<ul style="list-style-type: none"> Transitioning from a regular teacher to becoming a principal is that you realize that you might be a very, very good teacher, but you can also be a horrible principal. So, teaching doesn't necessarily prepare you for Principalship. 	<ul style="list-style-type: none"> I took over from someone who had acted for four months. So, the person was expecting that she would have been offered the post. And I was the one offered. So, at first, the person wasn't willing to assist until after a while. 	<ul style="list-style-type: none"> When they understand, they really get to understand your drive and your passion. And I'm studying their emotions, and you know how to relate to them. Then things end up working in my favour.
	007	<ul style="list-style-type: none"> I was approached and then I applied because of the approach. The past principal was one of the ones who participated in the approach 	<ul style="list-style-type: none"> It's probably been a combination of overwhelming and exhilarating. Okay, I like a challenge. So those two words can go together. I thought I would put them together overwhelming on one sense because it was a time with a steep learning curve. I was not the school community was not welcoming. And so it was, it was overwhelming. But then at the same time, the challenge sort of pushed me to be better and do better and prove them wrong. So, I think in a funny way, it's both overwhelming and exhilarating. Challenging, I would say challenging, you know, but challenging not in the way that we normally use challenging. Challenging in the way that it was a struggle overwhelming. But also challenging in that it 	<ul style="list-style-type: none"> The school community was not welcoming, and so it was, it was overwhelming. But then at the same time, the challenge sort of pushed me to be better and do better and prove them wrong. It was more than that, it was combative. And so, for example, there was a group, there's a group of parents that were very negative, and they would gather on the campus as happens in many schools. They would gather on the campus and stay beyond eight and you know, lambaste the principal and it was not a good look. And it was not a good, a good you know; not good for the school. 	<ul style="list-style-type: none"> 'See the woman can't manage,' so I pushed and pushed and pulled out all the stops, and so, that was why I was manager rather than leader. It doesn't mean that I wasn't leading, but in that first year or two, it was about making sure the nuts and bolts were in place because that's how he started; it must be fixing the nuts and bolts.

			challenged me to do better to be better.		
008	<ul style="list-style-type: none">You know, actually, I was on leave from XXXX, and I ran into somebody that I know very well.... and he presented the idea to me, and he said, “Why, have you thought about being principal at XXX? We would need somebody with your experience and your kind of approach to school leaders to help us with the restructuring of XXX”.	<ul style="list-style-type: none">It was a year of learning. It was a year of learning. It was, you know, and I give God thanks for the experience I had.It was a culture shock. So, having dealt with young adults at XXX, and now having to deal with 12-year-olds and they fight a lot, and they were just trying to discover themselves. I had to adjust. You know, and I had to develop some coping skills; develop some soft skills so that I could be very accommodating to them. Because what I discovered very early was that the culture that we were faced with was the inner-city culture. And clearly, it would have required a lot of love, a lot of emotional intelligence.	<ul style="list-style-type: none">Ingrained culture, so it's very difficult to change that culture most times. The kids were the problem. Like I said, and then having now they were drawn from different areas and a lot of them were coming from communities that had warring factions. So, guess what? They met on a common ground. So, I'm coming from [REDACTED] and they are in all kinds of war then they come to school.It plays out at school. And this was burdensome. This was just chaotic and difficult for the teachers, some of whom were coming from all over Jamaica. So, they have never seen anything like this. They have never seen a gun in a school. They have never seen a machete; they have never seen a boy just run down another one and jab him like nothing with a knife. So, they didn't know, they didn't know how to deal with it. So, you would have like two or three of them within a week.	<ul style="list-style-type: none">When I started as a principal, we had some challenges, you know. But as time goes by, people are paying more attention to research, and people are looking at what others are doing in the world, trends and all of that.I think the ministry has gotten much better. So, the whole aspect of being a Maverick principal is more accommodating. And I remember as a young principal, I did a lot of training.Inclusion, A bit of transactional leadership. You know, because when you, I mean, you have to temper your transformational leadership skills.	
009	<ul style="list-style-type: none">Well, I didn't as I said, I don't aspire to be any of these things; I	<ul style="list-style-type: none">The transition was smooth, you know. And the reason why it was smooth wasbecause I came, and I had an idea of the school.	<ul style="list-style-type: none">Very difficult job. It's a job. It's a job where you may lose your friends. Because your friends will now want special favours. And if	<ul style="list-style-type: none">One thing is, you the principal better be or better have been a	

	was always selected. I was always what you called 'nominated'.	<p>My husband was there; I never knew I would be there. I never planned to leave XXX. I planned to retire down there.</p> <ul style="list-style-type: none"> Yes. So, I would say my transition has been smooth. And probably, my repetition must have gone ahead of me. I don't know. Because, I don't have any, I didn't have any opposition even coming here. I didn't have any of that. It's just that, you know, um the only problem I could have, I think is maybe getting teachers up to what you want. 	<p>you are not principled, you will do it. And then you will be perceived. I have lost friendships as a result of taking up these jobs. But I cannot talk about school business with friends. I cannot. You can only talk to your pillow. you know.</p> <ul style="list-style-type: none"> It's a job where you will get information from all sources, but you cannot join the gossip. 	<p>worker. You cannot have a reputation of being a slacker...</p> <ul style="list-style-type: none"> A principal, no matter what the qualifications, no matter what the experience, must have an open mind. Each school has its own culture. You must take time to evaluate that. And then you must see where you can change. And how will the change come about? What I have seen is when the change involves people and when it comes to people, people don't want to change. So, when you want to implement change, you have to change their mind first. Have a discussion, have this, have that and give people time. So, you have to do a lot of mental education and once people understand, then you implement that slowly and steadily. That is a better way for me.
010	<ul style="list-style-type: none"> Um, when I, when I, so I was on a panel, working at XXX college, and that was when I was introduced to the idea of principalship by an Education Officer, to tried it. And that was when I tried, right (applied). 	<ul style="list-style-type: none"> I remember what helped me. I can remember buying two books of ASCD before I became a principal. But I told myself I wasn't ready because I hadn't heard of the position. I got wind of the appointment in August and was supposed to take it up in September. But I needed more 	<ul style="list-style-type: none"> And um, what happened when I went to XXX, was that I recognized that there were so many things that were not in place in terms of the syllabuses, course outline, and, for example, it's one of those schools where the averages of students coming in were like in the twenties and 	<ul style="list-style-type: none"> So those two books were my orientation into principalship in a theoretical way. What ranks as number one is the quality of the teacher. I feel that if I teach, if the quality of our

			<p>time in my head, both to sort of canvas the community that the school was serving, and I also wanted to learn some more about leadership. There were two books I had bought that I can remember right now: one, the name of it is 'On Becoming a School Leader: A Person-Centred Challenge to School Leadership and there was another one named 'The New Principal's Field book'. So those two books were my orientation into principalship in a theoretical way.</p> <ul style="list-style-type: none"> ▪ . 	<p>thirties, high 20s, low 30s..... But one of the things that I also had to deal with was discipline because it was a, it was, it was staff discipline as well as student discipline; more so staff discipline, because the parents never required much; many of the teachers pretty much did anything...but what had happened is that the school had settled into a little mode of discipline that was at least satisfactory.</p> <ul style="list-style-type: none"> ▪ No training could prepare for teachers who will just vilify you and say all kinds of things, simply because you're really trying to be efficient. I learned how to, not necessarily turn the other cheek, but to do good to them that hate you as the Bible says, and to do whatever, whatever to them that those that despitefully use you like. Things like that are things that I have learned, because I realised that poison and poison become even more deadly. So, what I tried to do was, I mean I have been in meetings and people make very snide remarks. I just don't respond, and I move on. And I remember one teacher coming to me outside one day to say, "I noticed, sir, when we talk 	<p>teacher's mind, and teacher's sense of balance and psyche are out of whack, you're not going to have a good school. So, one of the things I try to work on is teacher morale. As I work on their technical capacity, as I work on their, on their, on their need to comply with those things that are going to be in the interest of children learning.</p> <ul style="list-style-type: none"> ▪ You learn very, very quickly as a principal that if you're going to please your ego, your teachers are going to deflate you. So, I have learned to understand how to get to people. One of the strategies I've learned as a principal is that sometimes getting to a meeting to sell an idea is not a good thing. So, I will try to do one-on-one with most teachers, especially people that influence some people. So by the time I get to a meeting, I would have fleshed out many of the challenges there would be to it from the floor, so that people would start understanding and so they feel a part of it, because I had spoken to them and they had given their view, and I've included it in what would be that, what that draft that I'm going to be presenting to the whole staff to get support and,
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				<p>in meetings you don't respond to us," and I said, "You know why". And you know, they stopped. You learn how to be wise about responding to resistance, not by fire with fire, but, in a wise way, with wisdom.</p>	<p>and truly too, they work a little more enthusiastically with it.</p> <ul style="list-style-type: none">▪ Right? I'm not going to say that every time they do, but most times because of the one-on-one consultation before the presentation of a first draft, they tend to be there with you.
011	<ul style="list-style-type: none">▪ I applied.	<ul style="list-style-type: none">▪ let me tell you why, let me tell you why I use the word smooth. The word, the word 'smooth' came up because I have always been very inquisitive and curious...▪ ...so there was nothing that the principal was doing while I was a VP that I was not involved in and made myself available to learn. So, when I assumed the role, and Mrs. xxx stepped out, I did not have to call her to ask her anything, eight? Because I made myself available with all the things that were happening.	<ul style="list-style-type: none">▪ And that is one of the challenges that I might face, if I might call it a challenge and let me...and let me tell you why. Um, coming up through the ranks in the same institution, you were head of the department and then you were VP, and you had certain roles and responsibilities as VP and head of a department.▪ The transition up to principal now, especially in the earlier years was a bit difficult in terms of time management, because what you found is that you still had people coming to you and wanting you to carry out the role of the VP and HOD the same way.▪ I think, historically, the Ministry has put themselves in a, you know, the position, that causes this kind of, of, um, issue within the education system, because it would have appeared in the early days that being a senior teacher, or any part of management, was	<ul style="list-style-type: none">▪ There has to be some level of compromise as well. But all in all, once people recognise that, you want to row the boat to a particular point to achieve particular success, I think the majority if not all persons will be a part of that goal.▪ Well.... technically, as I said before, the emotional intelligence really worked out quite well. But in terms of, in terms of the transition, it's really, it's really just basically tried to lead and try to share your, try to share your, your vision. Basically, let the team know that this is what we are about. And just to try and do and really do some, some, some objective leadership qualities.▪ ...when I'm just listening and nobody can tell what, but I just allow, I just allow people to speak and I just have that, that look where I am just listening. I'm not forming any opinion. I'm	

				<p>more like a birthright or years of service reward. And that is why we had this complicated issue, where if a younger person who is competent came in or rose through the ranks and got a position, it caused a kind of mutiny among staff and so on. I think significant effort has been made over the years to kind of re-culture.</p>	<p>not doing anything and so on. And then now after the person has been allowed to do everything, then you can say, in summary, you can say ‘Well, you said that, and based on that, this is. and because you had alluded to this’, and so, so, so as you start to, you start to repeat the things that they were saying so that they actually recognize you were listening.</p>
012	<ul style="list-style-type: none">▪ I was asked a number of times, and I didn't take it up before. I decided to take it up this time because there was a need for somebody to fill a gap that was left vacant.▪ I'm a XXX college ‘old boy’; I would not have gone somewhere else so easily. I was asked to go to other places too, and I didn't go.	<ul style="list-style-type: none">▪ And so yes, I had a fair idea of what was required of me. There were changes in my modus operandi that I would have to take. For example, I'm coming from the private sector, so if, for example, you don't come to my work for a couple of days, I'm going to fire you. If you can't give me a good reason for not turning up, or for being negligent or for underperforming, um, in unprofessional ways, that will get you fired.▪ In the public sector, that will get you a file built up and a hearing eventually,	<ul style="list-style-type: none">▪ Um, let's start with humans, which is probably the most challenging, their culture. There are cultures ingrained in schools that schools have developed over the years, in how they do things. And those cultures would lead you to where you are now. If you're going to get changes and improvement, then some of those cultures will have to change. Some will be adjusted and have to just totally change. So that change in how people do things was a big challenge over the first six months. And what I had to do was listen to people, get their rationale, and then ask them, ‘So tell me something do you think it's working? Are you satisfied?’	<ul style="list-style-type: none">▪ A culture change... and it's a culture change that took place without me fighting?▪ Our role is to help the parents to develop the children through partnerships with them. If you give them the information, they will have more information to help the children.....▪ And so, as you buy in more and more, and you share that philosophy more and more, and people understand, you get more and more people coming on board and saying, ‘You know, say this makes sense. Let's go.’ So that I think has worked for me, and that I think has worked. We still have work to do. We don't have a situation where we	

				say, 'You know, we are good'. We are a work in progress.
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