

Designing a Learning-Oriented Succession Planning Model for Elementary School Principals

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ABSTRACT

Objective: This study aimed to design a succession planning model for elementary school principals using a learning-oriented approach.

Methods and Materials: This study was conducted using an exploratory qualitative approach and Attride-Stirling's thematic network analysis. The research population consisted of experts in the field of educational sciences, including faculty members specializing in educational administration and senior administrators within the education system who had relevant academic and executive experience in succession planning. Snowball sampling was employed. In the fieldwork phase, semi-structured interviews were conducted either in person or online. The interviews were transcribed verbatim and imported into MAXQDA for organization and analysis. Through thematic analysis, the data and information required for the study were identified, analyzed, summarized, and classified. To ensure the quality of the findings, Lincoln and Guba's criteria of credibility, dependability, confirmability, and transferability were applied.

Findings: The findings indicated that learning-oriented succession planning for elementary school principals could be represented by a model comprising 90 basic themes, 14 organizing themes, and six global themes: personal characteristics and competencies of succession candidates; prerequisites and reasons for implementing the succession process; the four stages of selecting and training a successor; managers' and the organization's duties and responsibilities toward the successor; the process evaluation stage; and the assessment of outcomes and reasons for process failure.

Conclusion: Based on the findings, a succession planning model for elementary school principals is more effective when it is grounded in self-directed learning, the use of experience, continuous reflection, and professional interaction.

Keywords: succession planning, learning-oriented approach, elementary school principals

1 Introduction

Leadership continuity is a critical requirement for the sustainability, stability, and long-term effectiveness of contemporary organizations. In increasingly dynamic environments, organizations cannot rely on the assumption that capable leaders will always be readily available when managerial vacancies arise. Retirement, resignation, promotion, transfer, unexpected illness, organizational restructuring, and sudden departures may create leadership gaps that disrupt decision-making, weaken employee morale, and undermine institutional performance. Succession planning has therefore emerged as a strategic human resource management process through which organizations systematically identify critical positions, recognize individuals with leadership potential, develop their competencies, and prepare them to assume future responsibilities. Rather than being limited to the replacement of an outgoing manager, succession planning involves building a continuous internal pipeline of capable personnel who can preserve organizational knowledge, maintain operational continuity, and respond effectively to emerging challenges. Rothwell describes succession planning as a deliberate and systematic effort to ensure leadership continuity while developing talent from within the organization, emphasizing that effective succession systems must integrate talent identification, assessment, development, and placement into a coherent long-term process (Rothwell, 2010). This understanding has been reinforced in subsequent work, in which succession planning is presented as an essential mechanism for protecting organizations against leadership discontinuity and ensuring that qualified employees are prepared before key positions become vacant (Rothwell, 2016). From this perspective, succession planning is not a reactive staffing measure but a strategic investment in institutional resilience and human capital development.

The importance of succession planning becomes more evident when organizations face sudden leadership vacancies. Unplanned managerial departures can impose substantial direct and indirect costs, including delays in strategic decisions, deterioration of stakeholder confidence, disruption of organizational routines, and the loss of tacit knowledge accumulated by experienced leaders. Research on sudden chief executive vacancies has shown that unexpected leadership disruptions may generate long-term economic and organizational consequences, particularly when organizations lack prepared internal candidates and

formal transition mechanisms (Lambertides, 2009). Succession planning reduces such risks by enabling organizations to anticipate leadership needs, define competency requirements, and establish structured processes for identifying and preparing future managers. It also contributes to the management of human resource risks, because the absence of qualified personnel for critical positions can be regarded as a major organizational vulnerability. Human resource risk assessment indicates that workforce-related risks, including the loss of key employees, inadequate competency development, and weak replacement capacity, can affect organizational performance and strategic sustainability (Ebrahimi Tabar et al., 2023). Consequently, succession planning should be integrated with broader risk management, strategic planning, knowledge management, and human resource development systems rather than treated as an isolated administrative function.

Succession planning also has a close relationship with talent management and organizational productivity. Organizations that identify high-potential employees, provide them with developmental opportunities, and facilitate their mobility across roles are more capable of responding to changing strategic requirements. Talent mobility is regarded as a key succession management practice because it exposes potential leaders to diverse experiences, expands their organizational understanding, and prepares them for high-impact positions (Arth, 2011). Similarly, comprehensive talent management models emphasize that recruitment, competency assessment, training, career development, performance evaluation, and succession planning must function as interdependent components of a unified system for improving productivity (Mahfouzi et al., 2019). The effectiveness of succession planning is therefore influenced by the extent to which organizations create transparent career pathways, objectively evaluate employees' capabilities, and align individual development with organizational priorities. Knowledge management is also important because future leaders must acquire not only formal managerial skills but also the experiential and contextual knowledge required to perform effectively. The competencies of managers may mediate the relationship between knowledge management and succession planning, indicating that organizational knowledge produces succession outcomes only when it is translated into relevant leadership capabilities (Mohammadi et al., 2017). Thus, a successful succession system must facilitate both the transfer of existing knowledge and the continuous development of new competencies.

Although succession planning is applicable across sectors, its design and implementation must reflect the structural and contextual characteristics of each organization. Research in public organizations has identified several recurring challenges, including political interference, inadequate merit-based selection, limited senior management commitment, ambiguous competency criteria, weak performance evaluation systems, and the absence of long-term developmental programs (Rajaei & Deminejad, 2025). Public-sector succession planning may be especially difficult because administrative regulations, centralized decision-making, bureaucratic constraints, and changes in senior leadership can interrupt continuity and reduce organizational commitment to the process. A thematic analysis of succession planning in public organizations has similarly indicated that effective models require organizational support, clear procedures, competency-based candidate selection, developmental interventions, and systematic evaluation (Shahabi, 2024). Studies of cultural organizations have also shown that succession management includes multiple dimensions such as talent identification, training and development, organizational culture, managerial support, performance appraisal, and career management (Ranjbar et al., 2021). These findings demonstrate that succession planning is a multidimensional organizational process shaped by institutional culture, governance arrangements, managerial attitudes, and available resources.

The role of organizational governance is another important consideration. Effective governance can strengthen succession planning by increasing accountability, clarifying decision-making authority, reducing arbitrary appointments, and promoting transparent evaluation of leadership candidates. Evidence from family firms indicates that corporate governance mechanisms can influence both succession planning and organizational performance by structuring the relationships among owners, managers, and potential successors (Li et al., 2025). In family businesses, continuity often depends on the organization's ability to distinguish personal relationships from managerial competence and to prepare successors through formal and systematic processes. Succession planning has therefore been identified as a key condition for the sustainability of family businesses, particularly when it is initiated early and supported by explicit criteria, mentoring, knowledge transfer, and gradual assumption of responsibility (Aladejebi, 2022). Although schools differ from family firms, both contexts illustrate that leadership transition

cannot be left to informal expectations or last-minute decisions. Sustainable succession requires structured preparation, legitimacy of the selected successor, and the confidence of stakeholders in the fairness and effectiveness of the transition process.

Within educational institutions, succession planning has distinctive importance because leadership changes directly affect teaching quality, organizational climate, teacher motivation, student outcomes, and relationships with families and the broader community. Educational institutions depend heavily on leadership continuity because principals coordinate instructional programs, manage human and financial resources, support teachers, address student needs, and translate educational policies into school-level practices. Research on succession planning in higher education has identified dimensions such as organizational readiness, leadership competency development, talent identification, mentoring, career planning, knowledge transfer, and evaluation (Albad et al., 2020). University-based studies also indicate that succession planning is necessary for preparing the next generation of academic and administrative leaders, particularly in contexts where experienced personnel are approaching retirement and institutional knowledge may be lost (Seniwoliba, 2015). In fourth-generation universities, which emphasize innovation, entrepreneurship, social responsibility, and knowledge-based value creation, the effectiveness of succession planning depends on strategic alignment, learning capacity, talent development, and adaptive leadership (Bahramzadeh et al., 2025). These findings suggest that educational succession planning must go beyond filling vacancies and should instead cultivate leaders who are capable of learning, innovation, collaboration, and institutional transformation.

The need for systematic succession planning is equally significant in schools and educational centers. Research on the indicators and components of succession planning in schools has emphasized the importance of identifying capable personnel, defining leadership competencies, implementing developmental training, conducting performance evaluation, creating organizational support, and establishing a culture that values leadership preparation (Jahanshiri et al., 2023). A specific succession planning model for academic heads has likewise demonstrated that succession processes in educational settings require careful candidate identification, competency assessment, professional development, mentoring, institutional support, and evaluation of readiness (Arrieta et al., 2022). However, school leadership succession is not merely an administrative

issue. Principals operate in complex social environments in which they must balance instructional leadership, personnel management, student well-being, parent expectations, inclusion, accountability, and continuous school improvement. Leadership styles can influence the implementation of inclusive education, and school principals' capacity to adopt entrepreneurial, adaptive, and supportive approaches can determine whether organizational changes are successfully translated into practice (Stavrou & Kafa, 2023). Consequently, selecting and preparing future school principals requires attention to personal characteristics, interpersonal competencies, instructional capabilities, problem-solving skills, emotional regulation, and the ability to lead learning.

Elementary schools provide a particularly important context for succession planning. At this educational level, school principals are responsible for creating the conditions under which children experience their first formal years of education, develop basic academic skills, establish learning habits, and form attitudes toward school. Elementary school principals must therefore combine administrative competence with a deep understanding of teaching, child development, teacher support, family engagement, and school culture. Weak leadership transitions at this level may affect not only organizational efficiency but also the continuity of instructional programs and the psychological security of students and staff. Principals must also respond to diverse student needs, manage relationships with parents, support teachers' professional development, and address emerging social and behavioral challenges. Because these responsibilities are multidimensional, succession candidates cannot be prepared through short-term theoretical courses alone. They require practical assignments, guided experience, reflection, mentoring, participation in decision-making, and gradual exposure to managerial responsibilities.

A learning-oriented approach provides a relevant conceptual foundation for addressing these requirements. In such an approach, succession planning is understood as a developmental process through which potential successors learn continuously from experience, interaction, reflection, feedback, and participation in authentic organizational tasks. Learning-oriented succession planning emphasizes that leadership competencies are not acquired solely through formal instruction but are developed through engagement with real problems, collaboration with experienced managers, self-assessment, experimentation, and the interpretation of organizational experiences. Research on learning-focused teacher leadership has shown that

educational leadership becomes more effective when leaders concentrate on improving teaching and learning, create opportunities for professional collaboration, and connect leadership practices to instructional improvement (Portin et al., 2013). This perspective is directly relevant to succession planning for school principals because future leaders must learn how to support teachers, interpret student needs, use evidence in decision-making, and maintain a collective focus on learning outcomes.

A learning-oriented model must also recognize the psychological and motivational conditions that enable principals and succession candidates to learn effectively. School principals often experience substantial job demands, role ambiguity, emotional pressure, and competing stakeholder expectations. Research on job crafting and well-being among school principals has shown that the satisfaction or frustration of basic psychological needs can influence how principals shape their work and experience occupational well-being (Toyama et al., 2022). Preparing successors therefore requires attention not only to technical skills but also to autonomy, competence, relatedness, resilience, emotional regulation, and confidence in performing the leadership role. Organizational rewards and supportive work conditions may further influence commitment, because employees are more likely to invest in long-term organizational roles when they perceive that their contributions are recognized and their development is supported (Richard, 2010). In succession planning, this implies that potential successors should receive meaningful developmental opportunities, constructive feedback, recognition, and a credible prospect of advancement. Without such motivational conditions, organizations may identify talented employees but fail to retain or engage them in the succession process.

The organizational context must likewise support continuous learning. Senior managers and former principals play an important role in transferring knowledge, providing mentorship, reducing uncertainty, and creating a psychologically safe environment in which succession candidates can practice new responsibilities. Studies of successful succession planning programs in hospitals have shown that senior leadership support, organizational culture, structured development, transparent selection, mentoring, and continuous evaluation are central success factors (Etemadian et al., 2019). The implementation stage is particularly important because even well-designed succession plans may fail when responsibilities are unclear, training is insufficient, senior managers are not committed,

or evaluation systems are poorly developed. An evaluation of succession planning implementation has demonstrated that organizational preparation, managerial support, candidate development, and systematic monitoring must be aligned if the program is to achieve its intended outcomes (Hosseini Golafshani et al., 2024). Best-practice reviews similarly emphasize that effective succession planning requires top-management commitment, integration with organizational strategy, objective assessment, developmental planning, mentoring, and periodic review (Bano et al., 2022). Accordingly, a school-based model should specify not only the characteristics of suitable successors but also the responsibilities of the school, senior administrators, and former principals throughout the process.

Succession planning must also be flexible enough to reflect diversity among potential leaders and the organizational environments in which they work. Research on succession planning for female managers has highlighted the influence of social interactions, institutional structures, gendered expectations, and access to professional networks on leadership development and advancement (Amini Dehghi et al., 2024). This perspective indicates that succession systems should not assume that all candidates encounter identical opportunities or constraints. Instead, organizations must recognize structural barriers, support equitable access to developmental experiences, and evaluate candidates using transparent and competency-based criteria. In educational organizations, this may involve providing diverse candidates with opportunities to participate in committees, lead projects, receive mentoring, and demonstrate their capabilities in authentic settings. Such measures strengthen both fairness and the quality of the leadership pipeline.

Leadership succession is ultimately a transition process, and the success of this transition depends on preparation before, during, and after appointment. Literature on leadership succession and organizational transition shows that poorly managed transitions may generate uncertainty, resistance, conflict, and performance decline, whereas planned transitions facilitate continuity, legitimacy, knowledge transfer, and stakeholder confidence (Siambi, 2022). A learning-oriented succession model should therefore include sequential stages beginning with the identification of organizational needs and potential candidates, followed by assessment, ranking, initial development, specialized training, controlled delegation of responsibilities, evaluation of readiness, and post-appointment support. It should also incorporate mechanisms

for assessing outcomes such as managerial stability, instructional quality, teacher satisfaction, student behavior, and parental trust. The process must be continuously reviewed because succession planning may fail when it is implemented mechanically, based on outdated information, or without the required managerial and instructional competencies.

Despite the growing body of research on succession planning in public organizations, higher education, hospitals, cultural institutions, family firms, sport organizations, and universities, limited attention has been given to the development of a context-specific and learning-oriented succession planning model for elementary school principals. Existing studies have identified valuable components of succession planning, yet many models remain focused on organizational staffing, competency lists, or administrative replacement without sufficiently explaining how potential school principals should learn through experience, reflection, guided participation, and professional interaction. Moreover, the distinctive characteristics of elementary schools require a model that integrates personal attributes, instructional leadership competencies, school-specific needs, stakeholder participation, organizational responsibilities, developmental stages, and process evaluation. A context-sensitive qualitative investigation can reveal the practical knowledge of educational experts and senior administrators, clarify the conditions under which succession planning succeeds or fails, and provide a framework that is both conceptually grounded and operationally applicable.

Accordingly, the aim of this study was to design a learning-oriented succession planning model for elementary school principals.

2 Methods and Materials

This study was conducted using an exploratory qualitative approach and Attride-Stirling's thematic network analysis. This approach was selected because the researcher sought to identify the variables and components required to develop a learning-oriented succession planning model for elementary school principals through a review of the theoretical foundations, in-depth interviews, and text mining. In an exploratory design, the researcher begins with qualitative data to explore and investigate the phenomenon under study.

The research population consisted of experts in educational sciences, including faculty members

specializing in educational administration and senior administrators within the education system who had relevant academic and executive experience in succession planning. Snowball sampling was used. After the initial identification of eligible individuals, they were asked to introduce other experts who possessed the necessary qualifications to participate in the study. This process continued until theoretical saturation was reached, meaning that the final interviews produced no new and meaningful data that could further develop or modify the categories. A total of 13 interviews were conducted.

Two complementary methods were used to collect the data: a library-based review and semi-structured interviews. The library-based review was conducted to identify the theoretical foundations, examine the research background, and assist in developing the interview questions. In the fieldwork phase, semi-structured interviews were conducted either in person or online. With the participants' informed consent, the interviews were recorded and subsequently transcribed. Each interview lasted approximately 45 to 60 minutes. After each interview, the researcher listened to the audio recording and transcribed all statements verbatim into Microsoft Word 2016, thereby converting the audio file into a textual document. Qualitative thematic analysis was then used to identify, analyze, summarize, and classify the data and information required for the study. The complete interview transcripts were imported into MAXQDA for organization and analysis.

To ensure the quality of the findings, Lincoln and Guba's criteria of credibility, dependability, confirmability, and

transferability were applied. To enhance dependability, the researcher maintained continuous engagement with the data, repeatedly reviewed the interview transcripts, and re-examined the codes and themes. A summary of the extracted codes and themes was also provided to five participants, whose level of agreement was approximately 85%. To strengthen credibility, all stages of the study—from sampling and interviewing to transcription, coding, and analysis—were documented in detail. A portion of the coding was also reviewed by a researcher familiar with qualitative research methodology, resulting in an estimated inter-coder agreement of approximately 87%. To establish confirmability, the linkage between the raw data and the extracted categories was preserved, and the final results were presented to three experts, whose level of approval of the conceptual framework was approximately 81%. To enhance transferability, the researcher provided a clear description of the research context, participant characteristics, data collection and analysis procedures, and the diversity of existing perspectives, thereby enabling readers to assess the applicability of the findings to similar settings.

3 Findings and Results

After the initial codes had been identified and extracted from the in-depth interview transcripts, they were classified according to their conceptual and content-related similarities, as presented in Table 1.

Table 1

Open Codes or Basic Themes

No.	Extracted Code
1	Trained implementers
2	Training process for implementers
3	Identification of strengths and weaknesses
4	A process-oriented perspective on succession planning
5	Review of candidates' records
6	Selection of a successor from within the organization
7	Consideration of the successor's individual characteristics
8	Leadership capacity as a prerequisite for succession
9	Assessment of the successor's personality
10	The successor's background
11	A specific age requirement for succession
12	Provision of basic skills training to the successor
13	Talent assessment of the successor
14	The need for talent in the successor
15	The need for strong morale and psychological resilience in the successor
16	The need for a high level of patience in the successor

17	The need for communication skills in the successor
18	The need for instructional leadership competencies in the successor
19	Requirement for prior managerial experience
20	Practical experience in the school environment
21	Identification of the successor's strengths and weaknesses
22	Shortage of competent principals as a reason for succession planning
23	Retirement and workforce departure as reasons for succession planning
24	New organizational demand as a reason for succession planning
25	Unexpected events as a necessity and rationale for succession planning
26	Communication ability as a characteristic of the successor
27	Selection process from within the school
28	Selection process from outside the school
29	Training in managing students' behavior
30	Training in the management of social harms and problems
31	Training in communication with parents
32	Training in adopting a learning-oriented approach to education
33	First stage: assigning controlled responsibilities
34	Second stage: establishing a pool of potential future principals
35	Administrative factors as an underlying requirement
36	Financial factors as an underlying requirement
37	Motivational factors as an underlying requirement
38	Theoretical training for the successor
39	Student density as a reason for the need for succession planning
40	Evaluation of process success through direct observation
41	Evaluation of process success based on the school's managerial stability
42	Evaluation of process success based on improved educational quality
43	Evaluation of process success based on improved student behavior
44	Evaluation of process success based on reduced parental complaints
45	Evaluation of process success based on increased teacher satisfaction
46	The need for familiarity with foundational information
47	The need for a holistic perspective at the beginning of the process
48	Continuation of the process based on a detailed and component-oriented perspective
49	Granting limited authority to succession candidates
50	Defining job descriptions and duties as a requirement for succession
51	Avoiding the creation of a competitive climate during the process
52	The need to strengthen teamwork during the process
53	Identifying and understanding the school's primary objectives
54	Selecting the succession candidate from within the organization
55	Efforts to reduce internal pressures
56	The successor's need to understand colleagues' abilities and individual characteristics
57	Adopting a long-term and continuous perspective on succession planning
58	Lack of scientific implementation as a reason for the failure of succession planning
59	Insufficient skills as a reason for the failure of succession planning
60	Outdated information as a reason for the failure of succession planning
61	Strengthening leadership competencies as an expected outcome of the process
62	Motivating other employees
63	Increasing succession candidates' self-confidence
64	Conducting courses and workshops for succession candidates
65	Support and assistance from former principals
66	Establishing a network to provide consultation to successors
67	Developing a scoring matrix for succession candidates
68	Designing an evaluation system for succession candidates
69	Training the successor in organizational culture
70	Transferring knowledge and intellectual capital to the successor
71	Selecting the successor according to the school's geographical location
72	Encouraging the successor to engage in creative problem-solving
73	Incorporating parents' views into successor selection
74	Senior managers' commitment to the process

75	The need for senior managers to maintain a positive attitude toward the process
76	Identifying the school's needs
77	Identifying challenges associated with process implementation
78	The need for a flexible succession planning program
79	Expectation management
80	Multidimensional identification and analysis of needs
81	Developing a process timeline
82	Assigning developmental and educational missions to the successor
83	Establishing a database
84	Creating challenging situations to test the successor
85	Reducing the successor's job-related anxiety at the beginning of the role
86	Patience as a characteristic of the successor
87	Emotion management as a characteristic of the successor
88	Problem-solving ability as a characteristic of the successor
89	Practical and experiential training for the successor
90	In-service training for the successor

Ultimately, 90 initial open codes, as presented in the table, were extracted from the interviews conducted with experts and specialists in the field of education. As previously stated, some codes were extracted directly from the interview transcripts and used as emic codes. For example, in Interview 2, the participant stated, "One of the components of succession planning is identifying talented teachers and principals." This statement was retained in essentially the same form and coded as "the need for talent in the successor" under Code B12.

Other codes were extracted and applied as etic codes. For example, Participant 7 stated, "In some schools, jealousy may arise among colleagues, causing employees to stop making an effort and lose hope of advancement." Based on the research literature, the researcher reformulated this conversational and informal statement into formal academic language and renamed it "motivating other employees" under Code G11.

At this stage, the following two categories of activities were undertaken:

1. Classification of the extracted codes into organizing themes;
2. Identification of patterns and classification of the organizing themes into global themes.

After the codes had been identified, they were classified into organizing themes. At this stage, codes that were conceptually similar were grouped into unified categories referred to as organizing themes.

In the second stage, based on the homogeneity and similarity of the extracted codes, the codes were grouped into different categories. Drawing on the review of the research literature, the researcher then assigned labels to the resulting categories. At this stage, a coding nomenclature was also applied to distinguish the codes identified during the previous stage. Table 2 presents the process of developing the organizing themes and naming the extracted codes. To identify the category to which each code belonged, the codes were renamed according to their corresponding categories and themes. Codes associated with each organizing theme were designated by a Latin letter.

Table 2

Organizing Themes Extracted From the Classification of the Research Codes

No.	Organizing Theme	Code/Indicator	Code Label
1	Personal characteristics required of the successor	The need for strong morale and psychological resilience in the successor	A11
2	Personal characteristics required of the successor	Patience as a characteristic of the successor	A12
3	Personal characteristics required of the successor	The need for perseverance in the successor	A13
4	Personal characteristics required of the successor	The need for talent in the successor	A14
5	Personal characteristics required of the successor	Leadership capacity as a prerequisite for succession	A15
6	Personal characteristics required of the successor	A specific age requirement for succession	A16
7	Personal characteristics required of the successor	The successor's background	A17
8	Personal characteristics required of the successor	Communication ability as a characteristic of the successor	A18
9	Competencies required of the successor	The need for communication skills in the successor	B11

10	Competencies required of the successor	The need for instructional leadership competencies in the successor	B12
11	Competencies required of the successor	Requirement for prior managerial experience	B13
12	Competencies required of the successor	Practical experience in the school environment	B14
13	Competencies required of the successor	The need for familiarity with foundational information	B15
14	Competencies required of the successor	Problem-solving ability as a characteristic of the successor	B16
15	Competencies required of the successor	Emotion management as a characteristic of the successor	B17
16	Fundamental need for succession planning	Administrative factors as an underlying requirement	C11
17	Fundamental need for succession planning	Financial factors as an underlying requirement	C12
18	Fundamental need for succession planning	Motivational factors as an underlying requirement	C13
19	Fundamental need for succession planning	Student density as a reason for succession planning	C14
20	Situational need for succession planning	Shortage of competent principals as a reason for succession planning	D11
21	Situational need for succession planning	Retirement and workforce departure as reasons for succession planning	D12
22	Situational need for succession planning	New organizational demand as a reason for succession planning	D13
23	Situational need for succession planning	Unexpected events as a necessity for succession planning	D14
24	Requirements before initiating the process	Trained implementers	E11
25	Requirements before initiating the process	A process-oriented perspective on succession planning	E12
26	Requirements before initiating the process	The need for a holistic perspective at the beginning of the process	E13
27	Requirements before initiating the process	Defining job descriptions and duties as a requirement for succession	E14
28	Requirements before initiating the process	Identifying and understanding the school's primary objectives	E15
29	Requirements before initiating the process	Identifying the school's needs	E16
30	First stage: identifying several succession candidates	Training process for implementers	F11
31	First stage: identifying several succession candidates	Establishing a database	F12
32	First stage: identifying several succession candidates	Consideration of the successor's individual characteristics	F13
33	First stage: identifying several succession candidates	Review of candidates' records	F14
34	First stage: identifying several succession candidates	Identification of the successor's personal strengths and weaknesses	F15
35	First stage: identifying several succession candidates	Identification of the successor's acquired strengths and weaknesses	F16
36	First stage: identifying several succession candidates	Increasing succession candidates' self-confidence	F17
37	First stage: identifying several succession candidates	Talent assessment of the successor	F18
38	First stage: identifying several succession candidates	Developing a scoring matrix for succession candidates	F19
39	First stage: identifying several succession candidates	Establishing a pool of potential future principals	F20
40	First stage: identifying several succession candidates	Developing a process timeline	F21
41	Second stage: ranking candidates and selecting the best candidate	Selecting a successor from outside the education system	G11
42	Second stage: ranking candidates and selecting the best candidate	Selecting a successor from within the education system	G12
43	Second stage: ranking candidates and selecting the best candidate	Selection process from within the school	G13
44	Second stage: ranking candidates and selecting the best candidate	Selection process from outside the school	G14
45	Second stage: ranking candidates and selecting the best candidate	Selecting the successor according to the school's geographical location	G15
46	Second stage: ranking candidates and selecting the best candidate	Continuing the process from a detailed and component-oriented perspective	G16
47	Second stage: ranking candidates and selecting the best candidate	Incorporating parents' views into successor selection	G17
48	Second stage: ranking candidates and selecting the best candidate	Designing an evaluation system for succession candidates	G18
49	Third stage: final selection and initial training	Assessing the personality of the successor as the final candidate	H11
50	Third stage: final selection and initial training	Providing basic skills training to the successor	H12
51	Third stage: final selection and initial training	Assigning controlled responsibilities	H13
52	Third stage: final selection and initial training	Theoretical training for the successor	H14
53	Third stage: final selection and initial training	Granting limited authority to the succession candidate	H15
54	Third stage: final selection and initial training	Training the successor in organizational culture	H16
55	Third stage: final selection and initial training	Transferring knowledge and intellectual capital to the successor	H17
56	Fourth stage: specialized training for the successor	Training in managing students' behavior	I11
57	Fourth stage: specialized training for the successor	Training in the management of social harms and problems	I12
58	Fourth stage: specialized training for the successor	Training in communication with parents	I13
59	Fourth stage: specialized training for the successor	Training in adopting a learning-oriented approach to education	I14
60	Fourth stage: specialized training for the successor	Conducting courses and workshops for succession candidates	I15

61	Fourth stage: specialized training for the successor	Encouraging the successor to engage in creative problem-solving	I16
62	Fourth stage: specialized training for the successor	Expectation management	I17
63	Fourth stage: specialized training for the successor	Practical and experiential training for the successor	I18
64	Fourth stage: specialized training for the successor	In-service training for the successor	I19
65	Duties of the organization and school regarding the process	Avoiding the creation of a competitive climate during the process	J11
66	Duties of the organization and school regarding the process	The need to strengthen teamwork during the process	J12
67	Duties of the organization and school regarding the process	Efforts to reduce internal pressures	J13
68	Duties of the organization and school regarding the process	The successor's familiarity with colleagues' characteristics	J14
69	Duties of the organization and school regarding the process	Adopting a long-term and continuous perspective on succession planning	J15
70	Duties of the organization and school regarding the process	Motivating other employees	J16
71	Duties of the organization and school regarding the process	Reducing the successor's job-related anxiety at the beginning of the role	J17
72	Duties of the organization and school regarding the process	The need for a flexible succession planning program	J18
73	Duties of senior and former managers regarding the process	Support and assistance from former principals	K11
74	Duties of senior and former managers regarding the process	Establishing a network to provide consultation to successors	K12
75	Duties of senior and former managers regarding the process	Senior managers' commitment to the process	K13
76	Duties of senior and former managers regarding the process	Senior managers' positive attitude toward the process	K14
77	Duties of senior and former managers regarding the process	Identifying challenges associated with process implementation	K15
78	Duties of senior and former managers regarding the process	Multidimensional identification and analysis of needs	K16
79	Evaluation of the succession planning process	Creating challenging situations to test the successor	L11
80	Evaluation of the succession planning process	Assigning developmental and educational missions to the successor	L12
81	Evaluation of the succession planning process	Strengthening leadership competencies as an expected outcome of the process	L13
82	Assessment of successful process outcomes	Evaluation of process success through direct observation	M11
83	Assessment of successful process outcomes	Evaluation of process success based on the school's managerial stability	M12
84	Assessment of successful process outcomes	Evaluation of process success based on improved educational quality	M13
85	Assessment of successful process outcomes	Evaluation of process success based on improved student behavior	M14
86	Assessment of successful process outcomes	Evaluation of process success based on reduced parental complaints	M15
87	Assessment of successful process outcomes	Evaluation of process success based on increased teacher satisfaction	M16
88	Reasons for process weakness or failure	Lack of scientific implementation as a reason for process failure	N11
89	Reasons for process weakness or failure	Insufficient skills as a reason for process failure	N12
90	Reasons for process weakness or failure	Outdated information as a reason for process failure	N13

Ultimately, 14 organizing themes were identified and classified at this stage of the coding process:

1. Personal characteristics required of the successor (A)
2. Competencies required of the successor (B)
3. Fundamental need for succession planning (C)
4. Situational need for succession planning (D)
5. Requirements before initiating the process (E)
6. First stage of the process: identifying several succession candidates (F)
7. Second stage: ranking the candidates and selecting the best candidate (G)
8. Third stage: final selection and initial training (H)
9. Fourth stage: specialized training for the successor (I)
10. Duties of the organization and school regarding the process (J)
11. Duties of senior and former managers regarding the process (K)
12. Evaluation of the succession planning process (L)
13. Assessment of successful process outcomes (M)
14. Reasons for process weakness or failure (N)

In the next stage, organizing themes with content-related and conceptual similarities were consolidated into broader

categories, thereby producing the global themes of the study. Table 3 presents the global themes together with all three levels of coding.

Table 3

Global Themes Extracted From the Classification of the Organizing Themes

No.	Global Theme	Organizing Theme	Code/Indicator	Code Label
1	Personal characteristics and competencies of succession candidates	Personal characteristics required of the successor	The need for strong morale and psychological resilience in the successor	A11
2	Personal characteristics and competencies of succession candidates	Personal characteristics required of the successor	Patience as a characteristic of the successor	A12
3	Personal characteristics and competencies of succession candidates	Personal characteristics required of the successor	The need for perseverance in the successor	A13
4	Personal characteristics and competencies of succession candidates	Personal characteristics required of the successor	The need for talent in the successor	A14
5	Personal characteristics and competencies of succession candidates	Personal characteristics required of the successor	Leadership capacity as a prerequisite for succession	A15
6	Personal characteristics and competencies of succession candidates	Personal characteristics required of the successor	A specific age requirement for succession	A16
7	Personal characteristics and competencies of succession candidates	Personal characteristics required of the successor	The successor's background	A17
8	Personal characteristics and competencies of succession candidates	Personal characteristics required of the successor	Communication ability as a characteristic of the successor	A18
9	Personal characteristics and competencies of succession candidates	Competencies required of the successor	The need for communication skills in the successor	B11
10	Personal characteristics and competencies of succession candidates	Competencies required of the successor	The need for instructional leadership competencies in the successor	B12
11	Personal characteristics and competencies of succession candidates	Competencies required of the successor	Requirement for prior managerial experience	B13
12	Personal characteristics and competencies of succession candidates	Competencies required of the successor	Practical experience in the school environment	B14
13	Personal characteristics and competencies of succession candidates	Competencies required of the successor	The need for familiarity with foundational information	B15
14	Personal characteristics and competencies of succession candidates	Competencies required of the successor	Problem-solving ability as a characteristic of the successor	B16
15	Personal characteristics and competencies of succession candidates	Competencies required of the successor	Emotion management as a characteristic of the successor	B17
16	Prerequisites and reasons for implementing the succession process	Fundamental need for succession planning	Administrative factors as an underlying requirement	C11
17	Prerequisites and reasons for implementing the succession process	Fundamental need for succession planning	Financial factors as an underlying requirement	C12
18	Prerequisites and reasons for implementing the succession process	Fundamental need for succession planning	Motivational factors as an underlying requirement	C13
19	Prerequisites and reasons for implementing the succession process	Fundamental need for succession planning	Student density as a reason for succession planning	C14
20	Prerequisites and reasons for implementing the succession process	Situational need for succession planning	Shortage of competent principals as a reason for succession planning	D11
21	Prerequisites and reasons for implementing the succession process	Situational need for succession planning	Retirement and workforce departure as reasons for succession planning	D12
22	Prerequisites and reasons for implementing the succession process	Situational need for succession planning	New organizational demand as a reason for succession planning	D13
23	Prerequisites and reasons for implementing the succession process	Situational need for succession planning	Unexpected events as a necessity for succession planning	D14
24	Prerequisites and reasons for implementing the succession process	Requirements before initiating the process	Trained implementers	E11
25	Prerequisites and reasons for implementing the succession process	Requirements before initiating the process	A process-oriented perspective on succession planning	E12
26	Prerequisites and reasons for implementing the succession process	Requirements before initiating the process	The need for a holistic perspective at the beginning of the process	E13
27	Prerequisites and reasons for implementing the succession process	Requirements before initiating the process	Defining job descriptions and duties as a requirement for succession	E14

28	Prerequisites and reasons for implementing the succession process	Requirements before initiating the process	Identifying and understanding the school's primary objectives	E15
29	Prerequisites and reasons for implementing the succession process	Requirements before initiating the process	Identifying the school's needs	E16
30	Four stages of successor selection and development	First stage: identifying several succession candidates	Training process for implementers	F11
31	Four stages of successor selection and development	First stage: identifying several succession candidates	Establishing a database	F12
32	Four stages of successor selection and development	First stage: identifying several succession candidates	Consideration of the successor's individual characteristics	F13
33	Four stages of successor selection and development	First stage: identifying several succession candidates	Review of candidates' records	F14
34	Four stages of successor selection and development	First stage: identifying several succession candidates	Identification of the successor's personal strengths and weaknesses	F15
35	Four stages of successor selection and development	First stage: identifying several succession candidates	Identification of the successor's acquired strengths and weaknesses	F16
36	Four stages of successor selection and development	First stage: identifying several succession candidates	Increasing succession candidates' self-confidence	F17
37	Four stages of successor selection and development	First stage: identifying several succession candidates	Talent assessment of the successor	F18
38	Four stages of successor selection and development	First stage: identifying several succession candidates	Developing a scoring matrix for succession candidates	F19
39	Four stages of successor selection and development	First stage: identifying several succession candidates	Establishing a pool of potential future principals	F20
40	Four stages of successor selection and development	First stage: identifying several succession candidates	Developing a process timeline	F21
41	Four stages of successor selection and development	Second stage: ranking candidates and selecting the best candidate	Selecting a successor from outside the education system	G11
42	Four stages of successor selection and development	Second stage: ranking candidates and selecting the best candidate	Selecting a successor from within the education system	G12
43	Four stages of successor selection and development	Second stage: ranking candidates and selecting the best candidate	Selection process from within the school	G13
44	Four stages of successor selection and development	Second stage: ranking candidates and selecting the best candidate	Selection process from outside the school	G14
45	Four stages of successor selection and development	Second stage: ranking candidates and selecting the best candidate	Selecting the successor according to the school's geographical location	G15
46	Four stages of successor selection and development	Second stage: ranking candidates and selecting the best candidate	Continuing the process from a detailed and component-oriented perspective	G16
47	Four stages of successor selection and development	Second stage: ranking candidates and selecting the best candidate	Incorporating parents' views into successor selection	G17
48	Four stages of successor selection and development	Second stage: ranking candidates and selecting the best candidate	Designing an evaluation system for succession candidates	G18
49	Four stages of successor selection and development	Third stage: final selection and initial training	Assessing the personality of the successor as the final candidate	H11
50	Four stages of successor selection and development	Third stage: final selection and initial training	Providing basic skills training to the successor	H12
51	Four stages of successor selection and development	Third stage: final selection and initial training	Assigning controlled responsibilities	H13
52	Four stages of successor selection and development	Third stage: final selection and initial training	Theoretical training for the successor	H14
53	Four stages of successor selection and development	Third stage: final selection and initial training	Granting limited authority to the succession candidate	H15
54	Four stages of successor selection and development	Third stage: final selection and initial training	Training the successor in organizational culture	H16
55	Four stages of successor selection and development	Third stage: final selection and initial training	Transferring knowledge and intellectual capital to the successor	H17
56	Four stages of successor selection and development	Fourth stage: specialized training for the successor	Training in managing students' behavior	I11
57	Four stages of successor selection and development	Fourth stage: specialized training for the successor	Training in the management of social harms and problems	I12
58	Four stages of successor selection and development	Fourth stage: specialized training for the successor	Training in communication with parents	I13
59	Four stages of successor selection and development	Fourth stage: specialized training for the successor	Training in adopting a learning-oriented approach to education	I14

60	Four stages of successor selection and development	Fourth stage: specialized training for the successor	Conducting courses and workshops for succession candidates	I15
61	Four stages of successor selection and development	Fourth stage: specialized training for the successor	Encouraging the successor to engage in creative problem-solving	I16
62	Four stages of successor selection and development	Fourth stage: specialized training for the successor	Expectation management	I17
63	Four stages of successor selection and development	Fourth stage: specialized training for the successor	Practical and experiential training for the successor	I18
64	Four stages of successor selection and development	Fourth stage: specialized training for the successor	In-service training for the successor	I19
65	Managers' and the organization's duties and responsibilities toward the successor	Duties of the organization and school regarding the process	Avoiding the creation of a competitive climate during the process	J11
66	Managers' and the organization's duties and responsibilities toward the successor	Duties of the organization and school regarding the process	The need to strengthen teamwork during the process	J12
67	Managers' and the organization's duties and responsibilities toward the successor	Duties of the organization and school regarding the process	Efforts to reduce internal pressures	J13
68	Managers' and the organization's duties and responsibilities toward the successor	Duties of the organization and school regarding the process	The successor's familiarity with colleagues' characteristics	J14
69	Managers' and the organization's duties and responsibilities toward the successor	Duties of the organization and school regarding the process	Adopting a long-term and continuous perspective on succession planning	J15
70	Managers' and the organization's duties and responsibilities toward the successor	Duties of the organization and school regarding the process	Motivating other employees	J16
71	Managers' and the organization's duties and responsibilities toward the successor	Duties of the organization and school regarding the process	Reducing the successor's job-related anxiety at the beginning of the role	J17
72	Managers' and the organization's duties and responsibilities toward the successor	Duties of the organization and school regarding the process	The need for a flexible succession planning program	J18
73	Managers' and the organization's duties and responsibilities toward the successor	Duties of senior and former managers regarding the process	Support and assistance from former principals	K11
74	Managers' and the organization's duties and responsibilities toward the successor	Duties of senior and former managers regarding the process	Establishing a network to provide consultation to successors	K12
75	Managers' and the organization's duties and responsibilities toward the successor	Duties of senior and former managers regarding the process	Senior managers' commitment to the process	K13
76	Managers' and the organization's duties and responsibilities toward the successor	Duties of senior and former managers regarding the process	Senior managers' positive attitude toward the process	K14
77	Managers' and the organization's duties and responsibilities toward the successor	Duties of senior and former managers regarding the process	Identifying challenges associated with process implementation	K15
78	Managers' and the organization's duties and responsibilities toward the successor	Duties of senior and former managers regarding the process	Multidimensional identification and analysis of needs	K16
79	Process evaluation stage	Evaluation of the succession planning process	Creating challenging situations to test the successor	L11
80	Process evaluation stage	Evaluation of the succession planning process	Assigning developmental and educational missions to the successor	L12
81	Process evaluation stage	Evaluation of the succession planning process	Strengthening leadership competencies as an expected outcome of the process	L13
82	Assessment of outcomes and reasons for process failure	Assessment of successful process outcomes	Evaluation of process success through direct observation	M11
83	Assessment of outcomes and reasons for process failure	Assessment of successful process outcomes	Evaluation of process success based on the school's managerial stability	M12
84	Assessment of outcomes and reasons for process failure	Assessment of successful process outcomes	Evaluation of process success based on improved educational quality	M13
85	Assessment of outcomes and reasons for process failure	Assessment of successful process outcomes	Evaluation of process success based on improved student behavior	M14
86	Assessment of outcomes and reasons for process failure	Assessment of successful process outcomes	Evaluation of process success based on reduced parental complaints	M15
87	Assessment of outcomes and reasons for process failure	Assessment of successful process outcomes	Evaluation of process success based on increased teacher satisfaction	M16
88	Assessment of outcomes and reasons for process failure	Reasons for process weakness or failure	Lack of scientific implementation as a reason for process failure	N11
89	Assessment of outcomes and reasons for process failure	Reasons for process weakness or failure	Insufficient skills as a reason for process failure	N12
90	Assessment of outcomes and reasons for process failure	Reasons for process weakness or failure	Outdated information as a reason for process failure	N13

Ultimately, in the final stage of the coding process, the organizing themes were classified into the study's global themes and categories, resulting in the following six global categories:

1. Personal characteristics and competencies of succession candidates
2. Prerequisites and reasons for implementing the succession process
3. Four stages of successor selection and development
4. Managers' and the organization's duties and responsibilities toward the successor
5. Process evaluation stage
6. Assessment of outcomes and reasons for process failure

4 Discussion

The present study aimed to design a learning-oriented succession planning model for elementary school principals. The findings resulted in a comprehensive model consisting of 90 basic themes, 14 organizing themes, and six global themes: personal characteristics and competencies of succession candidates; prerequisites and reasons for implementing the succession process; the four stages of successor selection and development; managers' and the organization's duties and responsibilities toward the successor; the process evaluation stage; and the assessment of outcomes and reasons for process failure. Collectively, these findings indicate that succession planning in elementary schools is not a discrete appointment procedure or a short-term response to managerial vacancies. Rather, it is a continuous, multidimensional, and developmental process that begins with the identification of organizational needs and talented candidates, continues through assessment, gradual empowerment, experiential learning, and specialized training, and concludes with systematic evaluation and ongoing organizational support. The learning-oriented dimension of the model further suggests that prospective principals should not merely receive information about managerial duties; they must actively construct leadership competencies through experience, reflection, feedback, professional interaction, and engagement with authentic school-related challenges.

The first global theme concerned the personal characteristics and competencies required of succession candidates. The findings showed that potential successors should possess strong morale, patience, perseverance, talent, leadership capacity, communication ability, emotional

management, problem-solving skills, instructional leadership competence, managerial experience, and practical familiarity with the school environment. This result demonstrates that effective school leadership succession depends on a combination of dispositional qualities, interpersonal abilities, technical competencies, and context-specific experience. Managerial appointments based solely on formal qualifications or seniority may therefore be insufficient because the principalship requires the ability to manage people, emotions, instructional processes, organizational conflicts, and unexpected problems. This finding is consistent with research emphasizing that succession planning should be based on clearly defined competency profiles and systematic assessments of candidates' potential and readiness (Rothwell, 2010, 2016). It also aligns with the finding that managerial competencies constitute an important mechanism through which organizational knowledge contributes to succession planning outcomes (Mohammadi et al., 2017). In school settings, identifying communication, instructional leadership, decision-making, and problem-solving capabilities is particularly important because principals must simultaneously manage educational, administrative, relational, and developmental responsibilities.

The emphasis on instructional leadership in the present model is especially significant. Elementary school principals are not merely administrative officers; they are responsible for directing the school's core educational mission. Their effectiveness depends on their ability to support teachers, monitor instructional quality, understand student needs, facilitate professional learning, and establish a culture centered on learning. The present finding is supported by research on learning-focused teacher leadership, which indicates that educational leadership is more effective when leadership activities are explicitly connected to improvements in teaching and learning (Portin et al., 2013). It is also consistent with research indicating that principals' leadership styles influence the implementation of inclusive education and their capacity to respond to diverse organizational and student needs (Stavrou & Kafa, 2023). Therefore, a learning-oriented succession model should not treat instructional leadership as a secondary competency. It should be central to the identification, training, and evaluation of prospective elementary school principals.

The second global theme included the prerequisites and reasons for implementing succession planning. Administrative, financial, and motivational factors were identified as fundamental requirements, while student

density, shortages of competent principals, retirement, workforce departure, emerging organizational demands, and unexpected events were identified as major reasons for establishing the process. These findings show that succession planning is both a strategic necessity and a response to operational vulnerability. Schools and educational systems may experience serious disruptions when leadership vacancies occur without prepared replacements. The finding is consistent with evidence that sudden leadership vacancies can have enduring organizational and economic consequences when formal transition mechanisms are absent (Lambertides, 2009). It also accords with research viewing the absence of qualified personnel for key positions as a significant human resource risk (Ebrahimi Tabar et al., 2023). From this perspective, succession planning serves as a preventive mechanism that reduces dependence on emergency appointments and enables the education system to maintain continuity under predictable and unpredictable conditions.

The prerequisites identified in the model included trained implementers, a process-oriented perspective, a holistic view at the beginning of the process, clearly defined job descriptions, understanding of school objectives, and systematic identification of school needs. These findings indicate that succession planning cannot succeed unless the organization itself is prepared to implement it. Even talented candidates may not be developed effectively when the process lacks clear criteria, competent implementers, organizational resources, or alignment with school goals. This result is consistent with studies showing that organizational readiness, managerial commitment, transparent procedures, and alignment with institutional strategy are essential to effective succession planning (Bano et al., 2022; Shahabi, 2024). It also corresponds with evidence from higher education that organizational readiness, talent identification, career development, mentoring, and evaluation are interrelated components of a successful succession system (Albad et al., 2020). Accordingly, the effectiveness of succession planning depends not only on who is selected but also on whether the education system possesses the structures and capacities required to develop that individual.

The third global theme described four stages of successor selection and development. The first stage involved identifying several candidates by establishing databases, reviewing records, assessing talents, examining strengths and weaknesses, and developing scoring systems and timelines. The second stage involved ranking candidates and

selecting the most suitable person from within or outside the school or broader education system while considering the school's geographical and contextual characteristics and, where appropriate, parents' views. The third stage included final selection, personality assessment, initial skills training, theoretical instruction, limited delegation of authority, and the transfer of organizational culture, knowledge, and intellectual capital. The fourth stage involved specialized training in student behavior management, social problems, communication with parents, learning-oriented education, expectation management, creative problem-solving, practical experience, and in-service development. These stages demonstrate that succession planning should progress from broad talent identification to increasingly focused assessment, development, and role preparation.

The staged structure of the model is strongly aligned with established succession planning theory. Rothwell argues that effective succession planning should involve the systematic identification of critical roles, assessment of high-potential employees, individual development planning, and preparation for future placement (Rothwell, 2010, 2016). The present model expands this logic within the elementary school context by specifying both general managerial development and school-specific competencies. Its emphasis on databases, candidate pools, scoring matrices, and gradual narrowing of options also corresponds with the principles of talent management and internal leadership pipeline development (Mahfouzi et al., 2019). Moreover, the creation of a pool of potential future principals reflects the concept of talent mobility, through which high-potential employees are exposed to diverse experiences and prepared for positions of greater responsibility (Arth, 2011). This approach reduces reliance on a single presumed successor and allows educational organizations to compare candidates over time using evidence of performance and developmental progress.

The finding that successors should preferably be identified from within the organization, while still allowing external selection when necessary, reflects the need to balance organizational familiarity with access to new competencies. Internal candidates may possess knowledge of school culture, regulations, personnel, local conditions, and stakeholder expectations. Such knowledge can reduce transition-related uncertainty and facilitate continuity. Research has shown that developing talent from within strengthens leadership continuity and preserves organizational knowledge (Rothwell, 2016). At the same time, exclusive dependence on internal candidates may limit

innovation or reinforce existing weaknesses. The inclusion of both internal and external recruitment pathways therefore makes the model more flexible and context-responsive. This result is consistent with succession planning models for academic heads that incorporate systematic candidate identification, competency assessment, and selection according to organizational requirements rather than relying on informal preference (Arrieta et al., 2022).

The learning-oriented character of the model is most evident in the emphasis on controlled responsibilities, limited delegation, practical assignments, experiential training, specialized workshops, and ongoing in-service education. These components indicate that leadership readiness develops progressively through active participation rather than passive instruction. Prospective principals must have opportunities to make decisions, solve authentic problems, observe experienced leaders, receive feedback, and reflect on the consequences of their actions. This finding is consistent with the view that talent development requires role mobility and exposure to high-impact experiences (Arth, 2011). It also aligns with research showing that succession planning in educational institutions should include mentoring, professional development, leadership assignments, and practical preparation for future roles (Arrieta et al., 2022; Seniwoliba, 2015). The emphasis on learning through experience also supports the study's conclusion that self-directed learning, reflection, professional interaction, and the use of accumulated experience are central to effective succession planning.

The fourth global theme concerned the duties and responsibilities of the organization, schools, senior administrators, and former principals. The findings emphasized avoiding a harmful competitive climate, strengthening teamwork, reducing internal pressures, motivating other employees, decreasing the successor's job-related anxiety, maintaining a long-term perspective, and designing a flexible succession program. Former principals were expected to provide support and guidance, while senior managers were expected to demonstrate commitment, maintain positive attitudes, identify implementation challenges, and conduct multidimensional needs assessments. This result illustrates that succession planning is a collective organizational responsibility rather than an individual developmental task. A candidate cannot be adequately prepared in an environment characterized by jealousy, ambiguity, distrust, or resistance to knowledge sharing.

This finding is supported by research showing that senior management commitment and organizational culture are among the most important determinants of succession planning success (Bano et al., 2022; Etemadian et al., 2019). The evaluation of succession planning implementation in a large public-sector organization has similarly shown that formal plans may not generate desired outcomes unless organizational support, managerial participation, and systematic development are present during implementation (Hosseini Golafshani et al., 2024). The importance of positive organizational relationships also corresponds with studies of succession management in cultural organizations, in which organizational culture, managerial support, professional development, and performance appraisal were identified as interdependent components (Ranjbar et al., 2021). Accordingly, the present model rightly places organizational climate and managerial commitment alongside technical selection and training procedures.

The role assigned to former principals and experienced managers is also important from the perspective of knowledge continuity. Much of the knowledge required for successful school leadership is tacit and cannot be fully codified in regulations or training manuals. Experienced principals possess contextual knowledge about staff relationships, community expectations, school history, recurring challenges, and effective informal practices. The transfer of this knowledge can reduce the successor's uncertainty and accelerate role adjustment. This finding is aligned with evidence that knowledge management contributes to succession planning through the development of managerial competencies (Mohammadi et al., 2017). It also supports the inclusion of mentoring and professional networks as mechanisms for sustaining institutional memory. Such support may improve successors' psychological readiness, particularly because principals' well-being and adaptive functioning are influenced by the satisfaction of needs for competence, autonomy, and relatedness (Toyama et al., 2022).

The fifth global theme concerned evaluation of the succession planning process. The proposed indicators included placing candidates in challenging situations, assigning developmental missions, and assessing whether their leadership competencies improved. This finding suggests that readiness for the principalship cannot be determined only through interviews, academic credentials, or self-reported capabilities. Candidates must be observed in authentic or simulated situations requiring judgment, communication, emotional control, instructional leadership,

and problem-solving. Evaluation should therefore be developmental and performance-based. This result is consistent with best-practice succession planning, which emphasizes the need for objective assessment, repeated review, and evidence-based judgments of candidate readiness (Bano et al., 2022). It also aligns with studies highlighting evaluation systems as essential to succession planning in educational and public organizations (Jahanshiri et al., 2023; Shahabi, 2024). A learning-oriented process should use evaluation not merely to eliminate candidates but to identify developmental needs and guide subsequent learning activities.

The sixth global theme addressed the assessment of successful outcomes and the reasons for process failure. Success indicators included observable performance, managerial stability, improved educational quality, better student behavior, fewer parental complaints, and greater teacher satisfaction. These indicators reveal that the ultimate value of succession planning should be assessed through school-level outcomes rather than solely through whether a vacancy has been filled. Effective succession should strengthen institutional continuity and improve the quality of leadership experienced by teachers, students, and families. The inclusion of teacher satisfaction and parental complaints also reflects the relational nature of school leadership. Organizational rewards, supportive work conditions, and effective management are associated with stronger employee commitment (Richard, 2010), while leadership practices influence the school's capacity to implement educational policies and respond to stakeholder needs (Stavrou & Kafa, 2023). Therefore, succession planning should be judged by its broader effects on the school community.

The reasons for failure identified in the present study were nonscientific implementation, insufficient skills, and outdated information. These findings show that succession planning may become ineffective when it is reduced to a symbolic administrative program or when candidate selection is based on informal preferences rather than evidence. Similar challenges have been reported in Iranian public organizations, including weak meritocracy, political or personal interference, inadequate managerial commitment, and the absence of reliable assessment systems (Rajaei & Deminejad, 2025). The result also agrees with research showing that succession programs require continuous updating and adaptation to changing organizational needs (Siambi, 2022). Educational systems are dynamic, and the competencies needed by future

principals evolve in response to technological change, inclusion policies, new accountability requirements, social challenges, and changing expectations from families. Consequently, succession planning must remain flexible, evidence-based, and continuously revised.

5 Conclusion

Overall, the findings suggest that a learning-oriented succession planning model for elementary school principals should combine strategic workforce planning, competency-based selection, talent management, experiential development, knowledge transfer, organizational support, and multidimensional evaluation. The model's major contribution is its integration of general succession planning principles with the specific instructional, relational, and developmental responsibilities of elementary school leadership. Its staged structure also provides a practical pathway through which potential principals can gradually move from identification to readiness. This interpretation is consistent with research in universities, schools, public organizations, hospitals, cultural institutions, sport organizations, and family firms, all of which emphasize that sustainable succession depends on systematic preparation rather than reactive replacement (Aladejebi, 2022; Amini Dehghi et al., 2024; Bahramzadeh et al., 2025; Li et al., 2025). The findings further indicate that succession planning is most likely to succeed when learning is embedded throughout the process and when candidates are supported in transforming experience into professional competence.

The present study had several limitations. First, the model was developed using a qualitative design and was based on the perspectives of 13 experts in educational administration and senior education managers. Although theoretical saturation was achieved, the findings may still reflect the professional experiences and interpretations of this particular group. Second, the use of snowball sampling may have resulted in the inclusion of participants from overlapping professional networks, which could have reduced the diversity of viewpoints. Third, the study focused on elementary school principal succession within a specific educational and administrative context; therefore, the applicability of the model to secondary schools, private educational institutions, or education systems with different governance structures should be approached cautiously. Fourth, the study developed a conceptual model but did not quantitatively test the relationships among its components or assess its effectiveness after implementation. Finally, some

categories were derived from participants' retrospective accounts, which may have been influenced by selective recall or individual interpretations of successful and unsuccessful succession experiences.

Future studies should quantitatively validate the proposed model using a larger and more diverse sample of principals, teachers, education administrators, and succession candidates. Researchers could develop a standardized instrument based on the 90 basic themes and examine the model's construct validity, reliability, and structural relationships through exploratory and confirmatory factor analysis or structural equation modeling. Comparative studies could also investigate whether the model differs across elementary and secondary schools, public and private institutions, urban and rural regions, and centralized and decentralized education systems. Longitudinal and experimental studies are particularly recommended to determine whether implementation of the model improves leadership readiness, school stability, instructional quality, teacher satisfaction, and stakeholder trust over time. Future qualitative studies could additionally include teachers, parents, current succession candidates, and newly appointed principals to provide a broader understanding of how the process is experienced by different stakeholders.

Educational authorities should establish a formal, transparent, and long-term succession planning system for elementary school principals rather than appointing replacements only after vacancies occur. School districts should create updated databases of high-potential educators, define clear competency profiles for the principalship, and use multiple assessment methods to identify suitable candidates. Selected candidates should receive gradual developmental opportunities, including mentoring, job shadowing, controlled delegation of responsibilities, participation in decision-making, practical school-management assignments, and specialized training in instructional leadership, student behavior, parent communication, emotional management, and problem-solving. Senior administrators and former principals should actively support candidates, transfer contextual knowledge, and reduce anxiety during leadership transitions. Finally, the effectiveness of the process should be evaluated using observable indicators such as managerial stability, educational quality, teacher satisfaction, student behavior, and parent feedback, and the program should be revised continuously in response to changing school needs.

Authors' Contributions

All authors have contributed significantly to the research process and the development of the manuscript.

Declaration

In order to correct and improve the academic writing of our paper, we have used the language model ChatGPT.

Transparency Statement

Data are available for research purposes upon reasonable request to the corresponding author.

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Declaration of Interest

The authors report no conflict of interest.

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Ethical Considerations

In this research, ethical standards including obtaining informed consent, ensuring privacy and confidentiality were observed.

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