

A proposal for intergenerational mentoring in the training of school headteachers

Ana Patrícia Almeida, Ana Mouraz & Irina Borges

Abstract

In Portugal, in recent months, dozens of school principals have left office after reaching the legal limit for candidacies. Some of these headteachers have held these leadership positions for around two decades and, during that time, have shaped the school groups they have coordinated, the leadership profiles they have naturalised in their schools, and the local policies they have helped to design to respond locally to the educational problems they have faced. How can the education system capitalise on this experience?

Based on the confluence of three key concepts: intergenerationality, mentoring, and professional development, this article aims to discuss how these three concepts can be articulated in the context of educational leadership.

This is an exploratory study that uses in-depth interviews with four headteachers at the end of their term.

As a result of this work, it was possible to inventory the possibilities and constraints of a training proposal on mentoring for school headteachers to be offered to former professionals who are now ending their long terms of office, so that, as a result of this training, they can ensure the sustainability, innovation, and resilience of school leadership through the systematic transfer of knowledge, the promotion of mutual respect, and the development of future school leaders.

Keywords:

Intergenerational learning; Mentoring; School leadership

Uma proposta de mentoria intergeracional na formação de diretores

Resumo: Em Portugal, nos últimos meses, dezenas de diretores escolares terminaram os seus mandatos, por terem atingido o limite legal de candidaturas. Alguns destes diretores desempenham estas funções de liderança há cerca de duas décadas e, ao longo desse tempo, moldaram os grupos escolares que coordenaram, os perfis de liderança que naturalizaram nas suas escolas e as políticas locais que ajudaram a conceber para responder localmente aos problemas educativos a que fizeram face. Como é que o sistema educativo pode capitalizar essa experiência? Partindo da confluência de três conceitos-chave: intergeracionalidade; mentoria e desenvolvimento profissional, este artigo tem como objetivo discutir como esses três conceitos podem ser articulados num contexto de exercício da liderança educacional. Este é um estudo exploratório, que utiliza entrevistas em profundidade com quatro diretores no final do seu mandato. Como resultado desse trabalho foi possível inventariar as possibilidades e constrangimentos de uma proposta de formação sobre mentoria para diretores escolares a ser oferecida a ex-profissionais que agora finalizam os seus mandatos longos, para que, em resultado dessa formação, garantam a sustentabilidade, a inovação e a resiliência da liderança escolar através da transferência sistemática de conhecimento, da promoção do respeito mútuo e do desenvolvimento de futuros líderes escolares.

Palavras-chave: Aprendizagem intergeracional; Liderança escolar; Mentoria

Une proposition de mentorat intergénérationnel pour la formation des directeurs

Résumé: Au Portugal, ces derniers mois, dizaines de directeurs d'école ont terminé leur mandat, ayant atteint la limite légale de candidatures. Certains d'entre eux occupaient ces fonctions de direction depuis près de deux décennies et, au fil du temps, ils ont façonné les groupes scolaires qu'ils coordonnaient, les profils de direction qu'ils ont naturalisés dans leurs écoles et les politiques locales qu'ils ont contribué à concevoir pour répondre localement aux problèmes éducatifs auxquels ils étaient confrontés. Comment le système éducatif peut-il tirer parti de cette expérience ? Partant de la convergence de trois concepts clés : l'intergénérationnalité, le mentorat et le développement professionnel, cet article vise à discuter de la manière dont ces trois concepts peuvent être articulés dans le contexte de l'exercice du leadership éducatif. Il s'agit d'une étude exploratoire, qui s'appuie sur des entretiens approfondis avec quatre directeurs en fin de mandat. Ce travail a permis de recenser les possibilités et les contraintes d'une proposition de formation sur le mentorat pour les directeurs d'école, destinée aux anciens professionnels qui terminent actuellement leur long mandat, afin que, grâce à cette formation, ils puissent garantir la durabilité, l'innovation et la résilience du leadership scolaire par le transfert systématique des connaissances, la promotion du respect mutuel et le développement de futurs leaders scolaires.

Mots-clés : Apprentissage intergénérationnel; Leadership; Mentorat.

Una propuesta de mentoría intergeneracional para la formación de directores

Resumen: En Portugal, en los últimos meses, decenas de directores escolares han finalizado sus mandatos al haber alcanzado el límite legal de candidaturas. Algunos de estos directores llevan desempeñando estas funciones de liderazgo desde hace aproximadamente dos décadas y, a lo largo de ese tiempo, han moldeado los grupos escolares que han coordinado, los perfiles de liderazgo que han naturalizado en sus escuelas y las políticas locales que han ayudado a diseñar para responder localmente a los problemas educativos a los que se han enfrentado. ¿Cómo puede el sistema educativo aprovechar esta experiencia? Partiendo de la confluencia de tres conceptos clave: intergeneracionalidad, mentoría y desarrollo profesional, este artículo tiene como objetivo discutir cómo estos tres conceptos pueden articularse en un contexto de ejercicio del liderazgo educativo. Este es un estudio exploratorio, que utiliza entrevistas en profundidad con cuatro directores al final de su mandato. Como resultado de este trabajo, fue posible inventariar las posibilidades y limitaciones de una propuesta de formación sobre mentoría para directores escolares que se ofrecerá a exprofesionales que ahora finalizan sus largos mandatos, con el fin de que, como resultado de esta formación, garanticen la sostenibilidad, la innovación y la resiliencia del liderazgo escolar mediante la transferencia sistemática de conocimientos, la promoción del respeto mutuo y el desarrollo de futuros líderes escolares.

Palabras clave: Aprendizaje intergeneracional; Liderazgo escolar; Mentoría

Introduction

Portugal is currently facing a marked ageing of its teaching staff, which is critically reflected in management bodies. According to data from the DGEEC (2024), more than 50% of teachers are over 50 years of age, and a large proportion of current school and school group headteachers belong to a generation that consolidated the current administration and management model (DL No. 75/2008), accumulating between 15 and 20 years of uninterrupted service. In fact, a large part of this contingent of headteachers is approaching retirement age, foreshadowing a mandatory, mass generational renewal over the next 5 years.

Given that in Portugal, the replacement of a headteacher is primarily seen as an administrative electoral act rather than a strategic transition process, the question arises: How can the Portuguese education system convert the structural turnover of leaders into a mechanism for professional development and pedagogical continuity?

The renewal of school leadership teams, at a time when schools are undergoing intense generational change, poses significant challenges to institutional continuity and the preservation of accumulated strategic knowledge. However, it simultaneously opens opportunities to reconfigure organisational cultures and enhance richer collaborative learning dynamics, creating incentives for outgoing headteachers to act as senior mentors during their successors' first year, while fostering models in which strategic knowledge is shared with middle management, diluting dependence on the single figure of the headteacher.

Internationally, a growing number of induction programmes for novice headteachers are being implemented to support them as they enter the profession. These programmes focus on instructional leadership, school improvement, change management and skills development, encouraging professional reflection through self-assessment and on-the-job support, with the help of a mentor or coach (Weindling, 2004). Considered one of the most effective ways to improve the leadership skills of new headteachers (Grissom & Harrington, 2010; Spiro et al., 2007), studies emphasise that experience and intergenerational mentoring guide new headteachers in developing goal setting and collaborative skills and affects their leadership growth (Bertrand et al 2018).

Intergenerationality, understood as the coexistence of different generations and as a relational process of knowledge production, provides a particularly fertile framework for understanding these dynamics. Studies show that the intergenerational circulation of knowledge, based on complementarity, reciprocity and co-construction, contributes to broadening professional repertoires, enhancing creativity in problem-solving and promoting more responsive and inclusive work environments (Leedahl et al., 2019; Venugopal et al., 2025). However, the literature also emphasises that

intergenerationality does not automatically materialise as an organisational resource: it requires intentionality, mediation and structural conditions that prevent the crystallisation of asymmetries and the marginalisation of certain generational groups (Higgins & Kram, 2001; Browne-Ferrigno & Muth, 2006; Cowin et al., 2016).

It is precisely at this point that mentoring proves to be a central tool. As a professional practice historically associated with the transmission of experience, mentoring has been reconceptualised in light of models that emphasise the relational, dialogical and distributed nature of learning (Higgins & Kram, 2001; Cowin et al., 2016; Hayes, 2019). In addition to supporting the organisational socialisation of new leaders, mentoring fosters the circulation of tacit knowledge, reflection on practice and identity building among emerging leaders, acting as a mediator between professional cultures and institutional changes (Browne-Ferrigno & Muth, 2006; Eyal et al., 2025). At the same time, contemporary models such as reverse mentoring challenge traditional hierarchies, giving younger generations an active role in digital updating, practice renewal, and the construction of more adaptive solutions in complex contexts (Indoria et al., 2025; Venugopal et al., 2025). This conceptual transformation of mentoring, from a transmission mechanism to a mutual development ecosystem, reveals its potential as a strategic tool for the future of educational leadership.

With regard to school leadership, there is consensus that organisational effectiveness depends on the ability of schools to simultaneously articulate continuity, innovation and strategic vision (Hallinger, 2003; Clarke & O'Donoghue, 2016). The current cycle of headteacher replacement, however, exposes persistent weaknesses in the mechanisms for succession and leadership training, which are often disjointed, unsystematic or insufficiently sensitive to the specificities of local contexts (Berry, 2025; Lazenby et al., 2022). It is in this scenario that mentoring asserts itself as a key element in developing fundamental skills, such as pedagogical leadership, team management, organisational reading skills, strategic communication and distributed leadership, especially in contexts characterised by greater social, cultural or digital complexity (Service et al., 2018; Van Jaarsveld et al., 2015). The growing centrality of digital transformation requires leaders capable of navigating new technological architectures and guiding educational communities through change, reinforcing the need for mentoring models that recognise generational diversity as an asset for leadership (Ruloff & Petko, 2025).

The articulation between intergenerationality, mentoring, and educational leadership thus emerges not only as a conceptual opportunity but as a strategic imperative for the future of schools. The literature converges in recognising that intentionally designed, context-sensitive intergenerational mentoring models promote meaningful learning, ensure greater institutional continuity and strengthen the adaptive capacity of organisations' adaptive capacity (Cowin et al., 2016; Batista et al., 2024). However, these models only reach their full potential when adopted as long-term organisational

policies, rather than as one-off interventions or those dependent on the voluntary efforts of professionals. Integrating the training of new headteachers into an intergenerational approach allows us to capitalise simultaneously on the experiential wisdom of older generations and the agility, digital literacy and new sensibilities brought by younger generations. From this convergence, a more sustainable, critical and innovative model of school leadership can emerge, prepared to face the growing challenges of contemporary schools and to collaboratively build the future of education.

1. Relevance of the study

Recent transitions in Portuguese school leadership have made it particularly urgent to understand how the professional knowledge accumulated over long terms of office can be mobilised for structured succession and leadership development processes. The proximity to the end of the term of office gives this study a unique exploratory character: listening to headteachers at precisely this moment allows us to capture mature, critical and experience-informed perspectives that are often absent from both formal assessment tools and available training programmes. Thus, collecting these narratives on the threshold of transition offers privileged access to interpretations of leadership, management practices and the conditions for sustainability in schools, justifying the scientific and social relevance of the research.

The relevance of this study is heightened when considering by its implications for the initial and ongoing training of future headteachers. Browne-Ferrigno and Muth (2006) emphasise that effective preparation for leadership requires the systemic integration of experiential knowledge into situated learning processes, while Hayes (2019) demonstrates that formative relationships based on authentic practices foster a more robust pedagogical leadership responsive to the contemporary demands of schools. By recognising and analysing the representations of experienced leaders at the moment of transition, the study produces knowledge applicable to the design of policies and training programmes that value the circulation of strategic knowledge and institutional continuity. The intensification of the international debate on the dynamics of mentoring and intergenerationality in educational contexts (Cowin et al., 2016; Leedahl et al., 2019; Venugopal et al., 2025) also reinforces the framework and relevance of the study. The articulation between different professional generations has been recognised as a resource for promoting innovation, strengthening organisations' social capital, and sustaining resilient leadership practices. Understanding how outgoing principals conceptualise mentoring and intergenerational interaction is therefore fundamental to transforming the leadership transition process into a strategic organisational development initiative. Together, these dimensions consolidate the relevance of the study and highlight its potential contribution to the development of

policies and practices that ensure more sustainable, continuous school leadership that is prepared to face emerging challenges.

2. Objectives of the study

In this context of high organisational and educational relevance, the study establishes two central objectives that guide the analysis and support the conceptual proposal for linking intergenerationality, mentoring and professional development.

The first consists of analysing the representations of four school headteachers, at the end of their term of office, on the role of mentoring in the training and transition of new school leaders. According to Browne-Ferrigno and Muth (2006), mentoring processes can act as essential catalysts in socialisation and preparation for leadership, while Cowin, Gates and Luckett (2016) emphasise the importance of relational and trust dimensions in supporting professional transitions. That said, this study aims to understand how these headteachers conceptualise mentoring as a practice of knowledge transfer, decision-making support and strategic continuity, a dimension also highlighted by Berry (2025), when analysing succession as a structured process of leadership continuity.

The second objective aims to discuss the convergence between intergenerationality, mentoring and professional development, examining how these three concepts reinforce one another in the educational context. Higgins and Kram (2001) argue that diverse learning networks promote more effective forms of professional development, while Eby and Lockwood (2005) demonstrate that the effectiveness of mentoring programmes depends on the quality of interactions and the perception of mutual benefit. Lazenby et al. (2022) also indicate that training practices sensitive to generational diversity contribute to more sustainable and adaptive leadership. Thus, this objective seeks to consolidate a conceptual analysis that allows us to understand how interaction between generations can be mobilised as a strategic resource for school leadership. By fulfilling these two objectives, we aim to contribute to the development of an intergenerational mentoring model that draws on the experience of outgoing headteachers and strengthens the continuity, innovation and resilience of school leadership in Portugal.

Methodology

This study adopts a qualitative interpretivist approach, grounded in the understanding that leadership practices, mentoring representations, and intergenerational dynamics are socially constructed and contextually embedded phenomena (Denzin & Lincoln, 2018). Given the study's objective of exploring how experienced school

headteachers conceptualise intergenerational mentoring at the end of their mandates, a qualitative design was considered the most appropriate strategy to access meanings, perceptions, and reflective accounts of professional experience.

The exploratory nature of the study is justified by the absence of empirical research in the Portuguese context articulating intergenerationality, mentoring, and leadership succession simultaneously. While previous studies have addressed mentoring in school leadership or intergenerational learning separately, no studies were identified that integrate these three conceptual dimensions within the specific context of leadership transition in Portugal. Therefore, the research privileges analytical depth and conceptual exploration over statistical generalisation (Guest, Bunce, & Johnson, 2006).

Participants and sampling strategy

Participants were selected through purposive sampling, based on predefined criteria aligned with the objectives of the study (Patton, 2015). The inclusion criteria were:

1. Being at the end of a long leadership mandate (or having just completed it);
2. Having exercised the role of headteacher for an extended period (between 15 and 22 consecutive years);
3. Having recognised professional trajectories within their educational communities;
4. Representing diverse geographical and organisational school contexts.

Four headteachers participated in the study (two men and two women). Their professional experience ranged from 15 to 22 years in leadership positions and they represented diverse contexts.

A detailed sociodemographic profile of participants is presented in Table 1, allowing a systematic overview of gender distribution, years of leadership experience, geographical location, school context, and educational levels offered.

Table 1
Participants' sociodemographic profile

Participant	Gender	Years as Headteacher	Region	School Context	Educational Levels Offered
Hx	Male	18 years	Lisbon Metropolitan Area	Urban	Kindergarten to Grade 9
Hy	Female	22 years	Northern Portugal	Urban	Kindergarten to Grade 12
Hx	Male	15 years	Central Portugal	Rural	Kindergarten to Grade 9
Hw	Female	20 years	Lisbon Metropolitan Area	Urban	Kindergarten to Grade 12

The relatively small number of participants is consistent with the in-depth exploratory design of the study, privileging experiential density and interpretative richness over numerical representativeness (Guest et al., 2006). The focus was placed on participants with high “experience intensity,” ensuring the collection of mature and reflective accounts at a critical moment of leadership transition.

Participants were contacted formally and informed about the aims of the study prior to the interviews. Although initial contact was facilitated through professional academic networks, participation was entirely voluntary.

Data collection procedures

Data were collected through semi-structured in-depth interviews, a method particularly suited to accessing professional trajectories, subjective interpretations, and reflective narratives (Kvale & Brinkmann, 2009). An interview guide was developed around four analytical dimensions:

1. Professional trajectory as a school leader;
2. Personal experiences and representations of mentoring;
3. Perceived role of mentoring in leadership professional development;
4. Perceived structure, challenges, and conditions for implementing mentoring programmes.

Interviews were conducted via videoconference by one of the researchers and lasted between 60 and 90 minutes. All interviews were audio-recorded with participants' consent and fully transcribed verbatim prior to analysis.

Ethical considerations and credibility procedures

Ethical principles were strictly observed throughout the research process, including informed consent, confidentiality, voluntary participation, and data protection in accordance with institutional research guidelines.

Although transcripts were not returned to participants for formal validation (member checking), credibility was reinforced through several strategies consistent with qualitative trustworthiness criteria (Lincoln & Guba, 1985). These included:

- Iterative reading of transcripts;
- Cross-coding between researchers;
- Analytical discussions to ensure consistency and reflexive interpretation;
- Systematic documentation of coding decisions.

These procedures enhanced analytical rigour and interpretative transparency.

Data analysis

Interview data were analysed using thematic analysis, following the six-phase framework proposed by Braun and Clarke (2006). This method was selected for its theoretical flexibility and capacity to identify patterns of shared meaning across participants' accounts while preserving contextual specificity.

The analysis followed six stages:

1. Familiarisation with the data;
2. Generation of initial codes;
3. Search for themes;
4. Review of themes;
5. Definition and naming of themes;
6. Production of the analytical narrative.

A combined deductive and inductive coding logic was adopted. Deductive coding was guided by the study's conceptual framework (intergenerationality, mentoring, and professional development), while inductive coding allowed the emergence of unanticipated categories grounded in participants' narratives (Nowell et al., 2017).

Coding was supported by MAXQDA software, enabling systematic organisation of data into hierarchical categories and subcategories. The analytical process resulted in five main thematic axes, which structure the Results section.

Results

The thematic analysis of the interviews with the four participants identified a set of recurring elements in the discourses on accumulated professional experience, mentoring, and intergenerationality in the exercise of school leadership. The data collected reveal points of convergence among participants with distinct professional trajectories, expressed through shared references to the conditions under which the leadership role is exercised and to the modes of learning associated with that trajectory. The results are presented across five analytical axes, corresponding to the categories emerging from the analysis, and are developed descriptively in the sections that follow.

1. Accumulated experience and leadership legacy

Across interviews, participants report that prolonged engagement in school leadership fosters the accumulation of professional knowledge described as situated, contextual, and strongly grounded in everyday practice. This knowledge is portrayed as resulting from learning in real-life contexts, described as progressive, experiential,

and constructed “on the ground”, with recurring references to the absence of stabilised frameworks at the point of entry into the role.

Headteacher X (Hx) describes learning the role as a predominantly experiential process, constructed through trial and error, stating that “it was a process of complete self-learning; we built solutions day by day”. Similarly, Headteacher Y (Hy) reports an abrupt transition into the role, marked by immediate adaptation and contextual learning “I was thrown into the role... it was a process of complete self-learning, carried out with colleagues and on the ground”. Headteacher Z (Hz) reinforces this perspective by emphasising the pace and demands of daily decision-making, stating that “in day-to-day work there is no time to stop and think; we learn to decide based on experience and on reading the context”. Headteacher W (Hw) emphasises the centrality of human and institutional dimensions in the knowledge mobilised, stating that “what made the difference in management and leadership were the people”.

Across all accounts, references are made to the difficulty of transferring this knowledge through exclusively formal mechanisms such as training, regulations, or manuals. It is emphasised that a significant part of leadership knowledge is dependent on sustained engagement with concrete situations, interpersonal relationships, and contextualised decision-making. **Hw** articulates this idea by referring to elements that cannot be acquired through manuals, stating that “behind every headteacher there is always a story, a trajectory, people and settings that cannot be learned from manuals”.

References to the loss of this knowledge upon the departure of directors with long trajectories are also recurrent across the interviews. **Hx** states directly that “accumulated experience should not be lost”. **Hy** highlights the existence of “an enormous capital of experience in schools, and it is a waste to let it be lost”. **Hz** refers to the lack of permanence of such knowledge within the organisation, stating that “when someone leaves, they take a great deal of knowledge with them that does not remain”, and further associates the limited circulation of experience with feelings of isolation, noting that “headteachers cannot be on their own; when experience does not circulate, isolation increases”.

2. Representations of mentoring

In the discourses of all participants, mentoring is consistently referred to as a valued mechanism, despite being absent as a formal practice throughout their professional trajectories. Across all interviews, the headteachers state that they did not benefit from any structured support at the point of entry into the role or during the initial phase of exercising leadership, describing this period as marked by autonomous learning and a lack of institutional support.

Hx recalls that “I was thrown into the role (...) there was no one to support us; it was learning by doing”. **Hy** confirms the absence of formal arrangements by stating that “there was never any formal support”. **Hx** describes the role as inherently solitary, stating that “the headteacher is very much on their own”, while **Hw** adds that it is a demanding role whose mastery results largely from individual learning, stating that “it is a demanding role, but you learn it on your own”.

Despite this absence of formal provision, participants refer to the existence of informal peer-support practices, retrospectively recognised as mentoring experiences, although never explicitly labelled as such. These practices are associated with occasional contacts, the sharing of doubts, and the discussion of sensitive decisions with more experienced colleagues. **Hx** notes that “we always ended up turning to colleagues around us to see how they had dealt with things, because the responses from the authorities were never clear”. **Hx** highlights the relevance of these informal interactions by stating that “we talked a lot among ourselves, because there were things only those in the role could understand”. **Hw** describes these exchanges as an important source of professional learning, stating that “we learned a great deal by talking to one another and exchanging experiences”.

In the collected data, mentoring is predominantly presented as a professional relationship of a relational, non-hierarchical nature, grounded in trust between peers. **Hx** explicitly states that “mentoring reinforces trust and helps you feel confident in what you are doing”. All participants clearly distinguish mentoring from mechanisms of supervision, evaluation, or institutional control. **Hy** states that “it is not supervision; it is sharing – it is between peers, to reinforce trust”, and **Hw** reinforces this distinction by stating that “if it is confused with inspection, it ceases to make sense”.

The discourses further describe the mentor as someone with relevant prior experience, capable of supporting the interpretation of complex situations without imposing solutions. **Hy** states that “the mentor is not there to impose anything, but to help the other person find their own path”, while **Hx** notes that “every school is different; experience serves to help you think, not to copy”. In all cases, the importance of the mentee’s autonomy and the appropriateness of guidance to the specific school contexts are emphasised.

Finally, participants report that they did not receive specific training for the mentoring role, despite recognising that, at different points in their careers, they had informally supported less experienced colleagues. This element is associated with the perception that mentoring constitutes a practice with distinct characteristics, rather than a simple extension of accumulated professional experience.

3. Intergenerationality as an opportunity

Across the interviews, participants refer to the coexistence of different generations of school headteachers as a structural reality of the education system, associated both with the recent renewal of leadership positions and with the prolonged permanence of headteachers with long professional trajectories. This coexistence is described predominantly in positive terms and is presented as potentially favourable to professional learning, provided that conditions are in place to promote sharing and dialogue between generations.

Participants identify differences between generations of headteachers in terms of leadership styles, expectations regarding the exercise of the role, and relationships with technological and organisational innovation. These differences are described as stemming from distinct historical and training contexts and are not associated with hierarchical value judgements. **Hx** refers to the acceleration of change in the educational context, highlighting the contribution of more recent generations to interpreting these transformations, stating that “things change very quickly, and sometimes it is the younger ones who help us understand what has changed”. **H_z** highlights the introduction of new languages and practices, particularly in the technological domain, stating that “younger headteachers bring different languages and a different relationship with technology, and that also forces us to learn”. **Hw** refers to differences in professional expectations and in ways of managing relationships, noting that “today, younger headteachers have different expectations and different ways of being, and that is neither better nor worse — it is different”.

At the same time, the discourses associate long leadership trajectories with a set of competencies developed over time, namely systemic readings of organisations, conflict management, and decision-making in contexts of uncertainty. **Hy** states that “there are things that only time can teach us, especially in how to deal with people and conflicts”. **Hw** adds that accumulated experience enables an understanding of human and institutional dimensions that go beyond formal regulations, stating that “what makes the difference is not only regulations, but people and the way relationships are managed”.

Participants describe intergenerationality as a space of complementarity of knowledge, in which the experiential knowledge of more experienced headteachers can be articulated with emerging competencies brought by more recent generations. **Hy** summarises this idea by stating that “we all learn from one another; no one knows everything”. Across all discourses, intergenerational learning is presented as potentially bidirectional, rather than limited to unidirectional flows of knowledge transmission.

Despite this positive valuation, participants consistently refer to the lack of structured mechanisms to promote intergenerational articulation among headteachers. **Hy**

states that “those who leave and those who arrive are left to their own devices”. **H_z** refers to the loss of organisational memory associated with the departure of experienced headteachers, stating that “when someone leaves, they take a great deal of knowledge with them that does not remain in the school”. **H_x** associates this absence of formal arrangements with professional isolation, stating that “everyone ends up learning on their own, and that makes everything more difficult”.

In this context, intergenerational mentoring emerges in the discourses as a mechanism identified by participants to operationalise articulation between generations, enabling the accompaniment of succession processes in school leadership. At the same time, participants explicitly reject conceptions of intergenerationality based on the uncritical reproduction of past models. **H_x** states that “experience is not there to say ‘do it this way’; it is there to help avoid mistakes we have already made”, and **H_z** reinforces that “each school has its own reality; experience helps you think, not copy”.

4. Identified potentials

All four participants identify a consistent set of potentials associated with the implementation of intergenerational mentoring in the context of the training and support of school headteachers. These potentials are described across different levels in the participants’ discourses, focusing on support for the exercise of the leadership role, the circulation of experiential knowledge, and the organisational stability of schools.

A first transversal potential refers to the emotional and strategic support provided to headteachers, which is described as particularly relevant during the initial stages of exercising the role. School leadership is portrayed as an activity marked by professional isolation, high decision-making pressure, and responsibilities of an administrative, organisational, and ethical nature. **H_x** states that “it is an isolated role, with many formal and even legal responsibilities”. **H_z** adds that “there are decisions we have to take completely on our own, and that weighs heavily”, while **H_w** highlights the strain associated with the role by stating that “there are days when we feel we are holding everything on our own”.

In this context, mentoring is presented as a relational space for listening and reflection, capable of mitigating professional isolation. **H_y** explicitly associates this support with the headteacher’s balance and with the functioning of the school organisation, stating that “if the headteacher is not well, the school is not well either”. Across all discourses, this form of support is described as compatible with the headteacher’s autonomy and is not associated with the imposition of decisions.

A second potential identified relates to the transfer of experiential knowledge, understood as practical and situated knowledge built over the prolonged exercise of the role and not fully codified in regulations or formal training provision. This knowledge

includes the interpretation of educational legislation, conflict management, relationships with different institutional actors, and the prioritisation of actions in complex contexts. **Hx** notes that “legislation is very complex... having someone with experience helps you understand what is essential and what can wait”. **Hx** states that “there are things that are not in official documents; they are only learned from those who have already been there”.

Hw associates this dimension with reading human dynamics, stating that “experience helps us read people and anticipate problems before they happen”. **Hy** adds that sharing experience can help avoid the repetition of errors, stating that “there are mistakes that do not need to be repeated if someone can explain them beforehand”. In the analysed discourses, mentoring thus emerges as a means of mediating and translating experiential knowledge, presented in a non-prescriptive manner.

A third potential concerns the contribution of mentoring to organisational stability and to the continuity of school leadership. Participants express concerns regarding the departure of headteachers with long professional trajectories and the consequent loss of organisational knowledge. **Hx** states that “when a headteacher leaves, they take a great deal of information with them that is not written down anywhere”. **Hw** associates this loss with the weakening of the school's identity and organisational culture, stating that “the school loses part of its history and its way of being”.

Hx describes mentoring as a possible link of continuity between leaderships, stating that “mentoring could be a way of ensuring that what has been built is not lost”. **Hy** highlights the relevance of such continuity for the consolidation of educational projects, stating that “projects need time and stability; changing everything suddenly weakens the school”. In this way, intergenerational mentoring is presented as a mechanism capable of accompanying succession processes, reducing abrupt ruptures.

The potentials identified by participants are synthesised in **Figure 1**, which illustrates the articulation between mentoring, relational support, knowledge transfer, and organisational stability, as described in the empirical data collected.

Intergenerational mentoring enhances school leadership

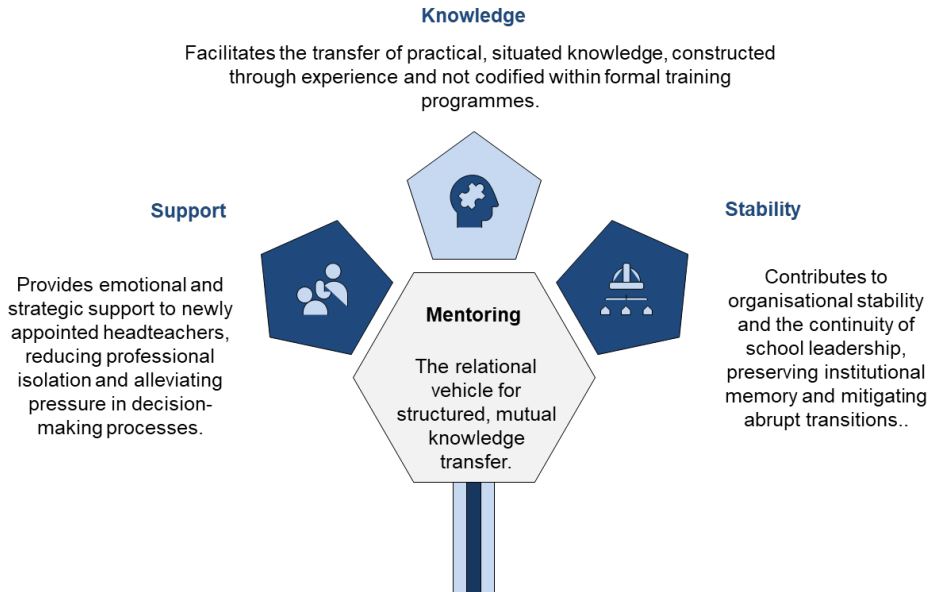


Figure 1
Conceptual synthesis of the identified potentials of intergenerational mentoring

5. Identified constraints

Despite the recognition of the potentials associated with intergenerational mentoring, all participants identify a consistent set of constraints affecting its effective implementation in the context of school leadership. These constraints appear in the discourses as factors that condition the institutionalisation and sustainability of mentoring as a support practice for headteachers, without being presented as insurmountable barriers.

A first transversal constraint refers to the absence of a formal political and institutional framework for the mentoring of school headteachers within the Portuguese education system. Participants refer to the lack of normative arrangements that recognise mentoring as a structured formative practice or as a function associated with the exercise of school leadership. **Hx** explicitly states that "there is formally no legal framework for mentoring". **Hy** notes that "there has never been a clear policy to support headteachers; everyone just manages as they can". **Hx** associates the lack of formal recognition with the voluntaristic nature of existing initiatives, stating that "as long as there is no institutional recognition, this will always depend on people's goodwill". **Hw**

links this situation to the predominantly administrative conception of the leadership role, stating that “as long as leadership is not regarded as a professional function with its own training and support, these things will not move forward”.

A second identified constraint concerns the scarcity of time and adverse organisational conditions. Participants describe the daily life of schools as marked by a high administrative and bureaucratic workload, limiting the availability for additional practices of support and reflection. **Hy** states that “the day-to-day life of schools is consumed by paperwork, reports, and constant urgencies”. **Hx** refers to the risk of mentoring being perceived as an additional demand, noting that “if there is no protected time, mentoring becomes just another task on top of everything else”. **Hw** adds that, without institutional provision, mentoring is unlikely to become established as a regular practice, stating that “with the pace at which we work, it only happens if it is clearly planned for and legitimised”.

A third constraint relates to the lack of incentives and professional recognition associated with the mentoring role. Although participants acknowledge the existence of intrinsic motivation to support colleagues at the beginning of their mandates, they note that the sustainability of mentoring requires explicit forms of institutional recognition. **Hx** states that “it has to make sense for the person mentoring; otherwise, it is not sustainable”. **Hx** notes that recognition is not limited to the financial dimension, stating that “it is not just about money; it is about recognising that experience has value for the system”. **Hw** associates the lack of recognition with the risk of disengagement, stating that “if there is no recognition, people eventually give up”.

In addition to structural and organisational constraints, participants refer to cultural and symbolic barriers associated with representations of school leadership. Three of the interviewees mention the persistence of a professional culture that places strong value on the headteacher’s individual autonomy and may interpret the search for support as a sign of weakness. **Hx** states that “some people feel that asking for support is admitting they are not up to the task”. **Hx** notes that “there is still the idea that the headteacher has to know everything and decide alone”. **Hw** adds that this representation may hinder engagement in mentoring if it is not clearly framed, stating that “if it is not well explained, it can be seen as control”.

A particularly sensitive constraint in the discourses concerns the risk of confusion between mentoring and supervision or institutional control. All participants emphasise the need for mentoring to be constituted as a protected space, grounded in trust and confidentiality. **Hx** states that “if it is seen as inspection, no one will want it”. **Hy** notes that “mentoring only works if it is not linked to evaluation”. **Hx** adds that ambiguity of roles compromises the mentor–mentee relationship, stating that “if there is doubt about what it is for, trust is lost”.

Finally, participants identify the risk of excessive interference or paternalism in the mentoring relationship if clear ethical regulation is not in place. Director Y states that “the mentor is not there to say how things should be done, but to help the other person think”. **Hw** underlines the importance of respecting the specificity of school contexts, stating that “each school has its own reality; experience cannot be applied mechanically”.

To deepen analytical clarity and support implementation-oriented interpretation, Table 3 organises the identified potentials and constraints according to their level (individual, relational, organisational, cultural, and policy), highlighting corresponding design implications and scalability requirements. By structuring these dimensions comparatively, the matrix makes explicit that mentoring feasibility depends not only on interpersonal willingness but also on structural and governance conditions.

Table 3
Potentials vs. constraints matrix for implementing intergenerational mentoring in school leadership

Dimension	Level	Potentials identified in the data	Constraints identified in the data	Design implications for implementation (conditions)	Scalability considerations
Relational support	Individual / Emotional	Reduction of isolation; emotional containment; space for listening and reflection; increased confidence	Leadership culture of self-sufficiency; reluctance to seek support; fear of appearing “weak”	Frame mentoring as professional development (not remediation); ensure confidentiality and voluntary participation; establish mentor training in active listening and boundary-setting	Scalable if embedded in induction and offered nationally with flexible formats (online/ hybrid)
Reflective autonomy	Professional / Practice	Strategic reflection without decision substitution; supported sensemaking in complex situations	Risk of paternalism; risk of prescriptive interference	Define ethical mentoring guidelines; train mentors in non-directive coaching; clarify that mentor supports reflection, not directives	Scalable through standardised mentor training + local adaptation clauses
Knowledge transfer	Cognitive / Expertise	Transfer of tacit knowledge (conflict management, institutional reading, prioritisation, navigating legislation)	Tacit knowledge hard to codify; time scarcity prevents sustained exchange	Provide protected time; develop structured mentoring prompts (case discussion templates); create optional “knowledge artefacts” (transition logs, scenario briefs)	Scalable via common tools/ templates while allowing contextual tailoring

Intergenerational complementarity	Intergenerational / Cultural	Bidirectional learning; complementarity (experience + innovation/digital fluency); mutual respect	Lack of structured intergenerational interaction; possible stereotyping if unmanaged	Include reciprocity principle (two-way mentoring moments); incorporate reverse mentoring sessions when relevant; prepare mentors/mentees for intergenerational communication	Scalable with modular programme design (core + optional modules such as digital leadership)
Organisational continuity	Organisational / Institutional	Continuity of projects and organisational memory; smoother succession; resilience in transition	Loss of organisational memory when leaders leave; abrupt rupture in leadership changes	Formalise transition period (e.g., first-year accompaniment); encourage structured handover processes; integrate mentoring into succession policies	Scalable through regional pilots and gradual adoption supported by evaluation indicators
Legitimacy & trust	Symbolic / Governance	Trust-building, peer legitimacy, safe space for dilemmas	Confusion between mentoring and evaluation/inspection; mistrust if linked to accountability mechanisms	Establish strict separation from evaluation; communicate programme purpose publicly; appoint independent coordination (not inspectorate)	Scalable only if governance is clear and consistent nationwide
Time & workload feasibility	Organisational / Operational	Potential for scheduled reflective spaces that improve leadership wellbeing and decision quality	Bureaucratic overload; mentoring perceived as "one more task"	Allocate protected time formally; integrate into workload; limit frequency with high-impact sessions (e.g., monthly + ad hoc)	Scalable if time is institutionalised (policy/contractual recognition)
Recognition and incentives	Institutional / Policy	Motivation to contribute; sense of responsibility to the system; willingness of outgoing headteachers	Lack of recognition threatens sustainability; dependence on goodwill	Create recognition mechanisms (certification, credits, formal role, symbolic status); clarify eligibility and expectations	Scalable if linked to CPD credits and national regulation
Programme governance	System / Policy	Potential to professionalise leadership induction; transform turnover into development	Absence of legal framework; no national policy for headteacher mentoring	Create regulatory framework defining role, ethics, eligibility, and coordination; establish monitoring indicators	Scalability depends on national policy, regional implementation capacity, and evaluation cycles

The matrix indicates that mentoring feasibility depends not only on relational dynamics but also on structural conditions (protected time, institutional recognition, and separation from evaluation). This reinforces the need for a governance model that safeguards trust while enabling programmatic scalability.

Discussion

The accounts of accumulated leadership experience reinforce the understanding of school leadership as a situated and practice-based form of knowledge construction

(Browne-Ferrigno & Muth, 2006). Participants' emphasis on experiential learning, contextual reading, and relational decision-making highlights the limits of formalised training in capturing the tacit dimensions of leadership. However, the findings extend this perspective by revealing a structural vulnerability: in the lack of intentional succession mechanisms, experiential capital is not institutionalised but dissipated with leadership turnover. This suggests that sustainability in school governance depends not solely on individual expertise, but on systemic strategies for knowledge mediation and transfer.

Participants' representations of mentoring align with relational and developmental models that conceptualise mentoring as dialogical, trust-based, and non-hierarchical (Cowin et al., 2016; Hayes, 2019). Notably, the strong distinction drawn between mentoring and supervision reflects a professional culture in which leadership autonomy is highly valued. The data suggest that mentoring can only be legitimised if clearly separated from evaluative or inspection frameworks. In this sense, trust emerges not as a secondary relational benefit but as a structural condition for mentoring viability, particularly in leadership contexts marked by decisional accountability and symbolic authority.

The positive framing of generational diversity resonates with research emphasising complementarity and reciprocal learning across age cohorts (Batista et al., 2024; Geeraerts, Tynjälä, & Heikkinen, 2018). However, the findings introduce a critical nuance: demographic coexistence does not automatically generate intergenerational exchange. Participants repeatedly pointed to the absence of formal mechanisms facilitating dialogue between outgoing and incoming leaders. This reinforces Higgins and Kram's (2001) argument that developmental networks require intentional structuring to become sustainable organisational resources. Intergenerationality, therefore, must be conceptualised as a governance strategy rather than a demographic condition.

The identified potentials of intergenerational mentoring extend beyond emotional support, encompassing organisational stability and strategic continuity. These dimensions align with international findings highlighting mentoring as a catalyst for leadership resilience and identity formation (Service et al., 2018; Van Jaarsveld et al., 2015). Importantly, participants framed mentoring as a mechanism capable of reducing professional isolation while preserving autonomy. This dual function, relational support without decisional substitution, appears central to the acceptability of mentoring among experienced leaders and may constitute a key design principle for programme implementation.

The constraints identified by participants reveal that mentoring sustainability depends on both structural and cultural conditions. The absence of a regulatory framework, protected time, and institutional recognition corresponds with literature

emphasising the importance of organisational embedding for mentoring effectiveness (Lazenby et al., 2022). Moreover, the cultural association of leadership with self-sufficiency introduces a symbolic barrier that may hinder participation unless mentoring is clearly framed as professional development rather than remedial support. These findings suggest that policy design must address not only procedural architecture but also professional identity narratives surrounding school leadership.

The integrated analysis demonstrates that the Portuguese education system is currently facing a critical governance gap in school leadership succession. Unlike systems such as Singapore or Australia, where structured leadership pipelines and induction programmes are institutionally embedded, succession in Portugal remains predominantly procedural and electoral rather than developmental. Although TALIS 2024 data indicate the existence of mentoring mechanisms for novice teachers, equivalent structures for newly appointed headteachers are scarce or non-existent (OECD, 2025). The findings of this study confirm that leadership transition continues to occur without systematic mediation of accumulated experiential knowledge.

However, the results suggest that the issue is not merely the absence of mentoring programmes, but the absence of an institutional architecture capable of transforming generational turnover into professional capitalisation. As synthesised in Table 3, mentoring feasibility operates across relational, organisational, cultural, and policy levels. This multi-layered configuration indicates that sustainable implementation depends on structural embedding rather than interpersonal goodwill alone.

The findings further reinforce literature on intergenerational learning that highlights complementarity and reciprocal exchange between age cohorts (Batista et al., 2024; Geeraerts, Tynjälä, & Heikkinen, 2018). Yet, this study introduces an important contextual nuance: demographic coexistence does not automatically generate intergenerational transfer. Without structured mediation, tacit leadership knowledge risks disappearing during succession processes. Intergenerational mentoring thus emerges not as an optional support device but as a governance strategy for organisational continuity.

Participants' insistence on distinguishing mentoring from supervision underscores the importance of symbolic legitimacy. Trust is not a by-product of mentoring; it is a precondition. In leadership cultures characterised by high decisional accountability and strong autonomy norms, mentoring must be explicitly framed as professional development rather than evaluative oversight. This aligns with relational mentoring models (Cowin et al., 2016; Hayes, 2019) while highlighting the need for governance safeguards specific to leadership contexts.

From a programme design perspective, sustainability requires three interdependent conditions: (1) formal institutional recognition of the mentor role; (2) protected time and operational feasibility; and (3) clear separation from accountability or

inspection mechanisms. Without these conditions, mentoring risks remaining voluntaristic and dependent on individual motivation.

The study therefore advances the field by conceptualising intergenerational mentoring not merely as relational accompaniment, but as institutional mediation – a mechanism capable of preserving organisational memory while enabling adaptive renewal. In the Portuguese context, where large-scale leadership turnover is imminent, such mediation may represent not simply an innovation, but a strategic necessity.

Conclusion

This study examined the intersection between intergenerationality, mentoring, and leadership succession at a critical moment for Portuguese school governance. By focusing on headteachers at the end of long mandates, the research captured a rarely explored temporal window in leadership studies, the moment of transition, revealing both the vulnerability and the potential embedded in generational turnover.

The findings indicate that accumulated leadership experience constitutes a form of institutional capital that remains largely unstructured and at risk of dissipation in the absence of formal mediation mechanisms. Intergenerational mentoring emerges, therefore, not merely as a supportive relational practice, but as a strategic instrument for organisational continuity and adaptive renewal.

Rather than positioning mentoring as remedial assistance for novice leaders, the study reframes it as a professionalised and ethically grounded practice capable of preserving institutional memory while fostering innovation. In this sense, generational renewal should not be perceived as a demographic disruption, but as an opportunity for systemic redesign.

Portugal currently faces a decisive policy juncture. The impending large-scale turnover of experienced headteachers presents a structural challenge, but also a transformative opportunity. By embedding intergenerational mentoring within a coherent governance framework, the education system may convert leadership transition into a mechanism for sustained professional development and institutional resilience.

Ultimately, this study argues that the future of school leadership does not depend solely on recruiting new leaders, but on constructing deliberate bridges between generations. In doing so, schools may ensure that experiential knowledge does not vanish with retirement, but instead becomes a foundation for the next cycle of educational innovation.

Statement on the Use of Generative Artificial Intelligence (GenAI)

The authors declare that generative artificial intelligence (GenAI) tools, specifically ChatGPT (OpenAI), were used to assist with language editing and translation during the preparation of this manuscript. Napkin AI was also used as a supportive tool in the preparation of figures. All

analytical, interpretative, and substantive contributions remain the sole responsibility of the authors, who take full responsibility for the content and conclusions presented.

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Ana Patrícia Almeida

Universidade Aberta,
LE@D, Laboratório de Educação a Distância e eLearning
Email: anap.almeida@uab.pt
ORCID: <https://orcid.org/0000-0001-5242-8285>

Ana Mouraz

Universidade Aberta,
LE@D, Laboratório de Educação a Distância e eLearning
Email: ana.lobes@uab.pt
ORCID: <https://orcid.org/0000-0001-7960-5923>

Irina Borges

Universidade Aberta,
LE@D, Laboratório de Educação a Distância e eLearning
Email: irina.borges@uab.pt
ORCID: <https://orcid.org/0009-0003-5975-9302>

Data de submissão:

Data de avaliação:

Data de publicação: