



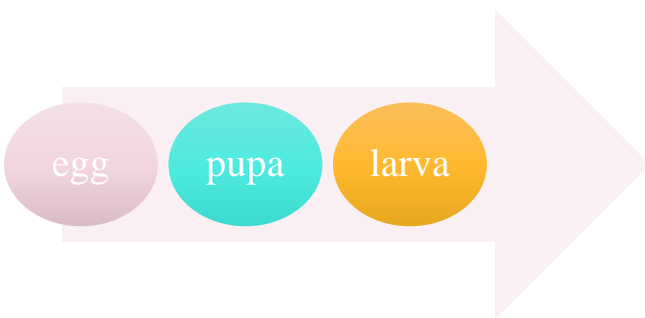
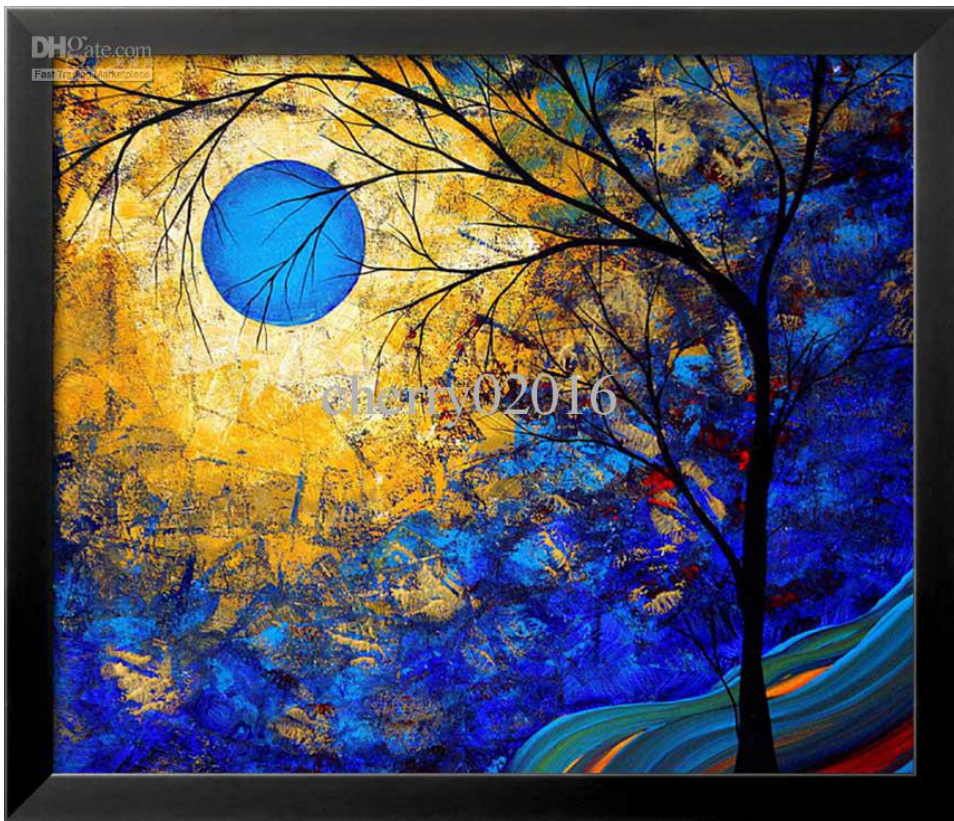
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The theme of Volumes I, II and III is “Developing a Global Mindset.” The theme for next year’s conference is: **Global Leadership and Change.**

Biography – Dr. June Schmieder -Ramirez

Dr. Schmieder-Ramirez is currently Program Director of the Doctorate in Organizational Leadership at Pepperdine University. She has co-authored several texts on finance and is the editor of the Journal of Global Leadership.

She facilitates the International Center for Global Leadership Conference every July at the Roberts Grove Conference Center in Placencia, Belize. She is very interested in the topic of technology and how technology may help developing economies.

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**EARLY IDENTIFIED GLOBAL LEADERS: GLOBAL LEADERSHIP SCORES ON
THE SCHMIEDER GLOBAL MINDSET INVENTORY AMONG ENTERING
LEADERSHIP DOCTORAL STUDENTS**

Presented at the International Center
for Global Leadership Conference
July 2015 – Placencia, Belize

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Abstract

There have been many approaches to leadership including the trait approach, the behavioral approach, the power-influence approach and the situational approach. We live in a networked world where it is important for leaders to be comfortable with uncertainty, communication across cultural lines, and knowing important elements from both Western and Eastern leadership strategies.

Purpose of the Study: The purpose of this study was to determine the scores of incoming doctoral students in organizational leadership on the Schmieder Global Mindset Inventory. This inventory determines the level of global sensitivity on a 50 point inventory. This is important because of the significance of possessing a global mindset as a CEO of a non-profit, NGO, or profit-making organization which has international ties. The EdD in Organizational Leadership and the new PhD in Global Leadership and Change at Pepperdine University both have the themes of “global leadership” in the programs.

Background/Importance of the Study: We live in a networked world. It is important that leaders not only have skills in technical, conceptual, and interpersonal skills but are able to deal with uncertainty and differences in cultures. The definition of “leadership” is proceeded by the word “global” in this study. Global leadership is considered important in this time. Intercultural communication and competence are essential skills of today’s leader. Intercultural competence includes the ability to communicate effectively in many cultures and possess a global mindset which will enable one to operate in a “white water world.”

Methodology: Fifty-seven incoming doctoral students took the Schmieder Global Inventory. Their scores were divided into: Realized State, (203 and up); Emerging mode: (182-202), and Growth Stage, (159-181). The inventory was developed by Dr. June Schmieder-Ramirez. It examines individuals in terms of such attributes as:

- Ability to cope with ambiguity
- Ability to lead in more than one culture
- Ability to develop and maintain a global mindset
- Ability to understand change and the pace of change in different cultures
- Ability to simultaneously develop and maintain a global and local perspective and understand how one can inform the other.
- Ability to develop and maintain networks in order to get things done.
- Ability to form effective teams in other countries

Results: The results have been tabulated. The inventory asks information regarding experiences in other countries, ability to tolerate ambiguity and uncertainty, and questions requiring both Western and Eastern ways of leading. The results are important because entering doctoral

students in the field of leadership should have an idea where they stand on a spectrum which measures their intercultural competence.

Introduction

We live in a white water world where it is necessary to deal with uncertainty and differences in cultures. World leaders of today need an agility of thought and the ability to nimbly move from the perspective of one culture to another. But what skills, knowledge and attitudes are necessary to be a global leader? Are there predispositions to be a global leader? What is a global mindset? Why is this important? What is a global mindset?

The purpose of this study was to present a thought piece on what is global leadership and why it is important, set forth some thoughts regarding whether a global mindset can be learned or whether there is a predisposition to such a skills, present thoughts on the best criteria for developing a global leadership themed doctoral program, and finally to present the findings of the Schmieder Global Mindset Inventory which is taken by entering doctoral students at a West Coast University. The study came about after an article was written by Dr. June Schmieder-Ramirez in *Scholar and Educator*, (Schmieder-Ramirez, 2012). She wrote this article to provide data to inform the doctoral programs at Pepperdine University. She asked the following questions:

Why is being a global leader important?

There are many myths about the term “global leadership.” Here are several found in the literature:

Myth #1: All you have to do is know the competencies of being a global leader and then concentrate about developing these strengths.

Competencies of a strong transcultural leader are important. The literature indicates that such items as the ability to deal with both ambiguity and linearity of thinking are important. However, according to Pankaj Ghemawat, 2012, these lists are just a starting point to becoming a global leader. He notes that one review of the literature indicates that there are three core competencies: self-awareness, engagement in personal transformation, and inquisitiveness; seven mental characteristics: (optimism, self-regulation, social judgment skills, empathy, motivation to work in an international environment, cognitive skills, and acceptance of complexity and its contradictions), and three behavioral competencies (social skills, networking skills, and knowledge).

Most researchers indicate that they feel that a “one size fits all” approach is less than helpful in trying to determine who has the skills of a global leader and what these skills are.

Myth #2: Most people easily trust people who are in another country;

According to Pankaj Ghemawat, (2012) trust declines sharply with the amount of distance between individuals. As one indication, he found over 85% of Facebook friends to be of the same country. Individuals get most of their news from domestic news organizations. His research indicates that many individuals may know two cultures very well but are not conversant with three or more cultures.

Myth #3: We have many culturally agile individuals who can move easily between one culture and another;

Caligiuri (2006) has indicated that we do not have a sufficient number of culturally agile leaders who can span the many groups which may be in one company.

Myth#4: It is easy to set up an international trip. This will enable students to become a global leader

It typically takes many years to become a true global leader. An immersion program can be useful in enabling global leadership characteristics. However, it does not take the place of study, continual immersion in other countries and personal relationships with others from different cultures.

Definitions:

Globalization: Lane and others (2004), stated that “globalization” indicates that there is increased complexity that may be unforeseen and may not be easily controlled or anticipated. (Mendenhall). There have been many definitions of “leadership,” and it is important that having a global mindset is clearly defined. (Include here)

Cultural Agility:

Who in history possessed a global mindset? Winston Churchill is widely regarded as possessing a global mindset.

Kets de Vries and Mead (1992) developed a set of qualities that they felt belonged to a global leader including:

1. Envisioning;
2. Strong operational codes;

3. Environmental sense making;
4. Ability to instill values;
5. Inspiring;
6. Empowering;
7. Building and maintaining organizational networks;
8. Interpersonal skills;
9. Pattern recognition;
10. Cognitive complexity;
11. Hardiness

Historical Background/ Assessment of the Environment

Leadership, as a study is related to many subjects. It is a multidisciplinary subject and is related to other fields such as ethics, sociology and psychology. Plato is commonly noted as one of the beginning thinkers of leadership as an academic discipline, (Annas, 2009). Plato envisioned a class society with warriors, governing and middle class.

Moving to the thinking of Machiavelli is important in the study of leadership. The academic themes behind *The Prince* showed how leaders maintained power when there are competing groups. The leader of today of course is much more “networked” and has power dependent on many forces and the internal and external forces.

Part of being a global leader is to be able to assess the environment before deciding on a course of action. The environment of a leader might involve social issues, political concerns, economic issues, legal, intercultural and technological. One might utilize an excellent assessment tool such as SPELIT (Schmieder, Mallette), to be able to assess the environment in a detailed way. Other ways that one might assess the environment include SWOT, and an analysis as has been done in “*Essence of Decision*” by Graham Allison, (1999).

What is the problem which needs to be addressed?

There is a lack of culturally agile business leaders in our ever-changing world, (Caliguri, 2006). Although we have programs which emphasize being a global leader, it is important to match the skills and potential of incoming doctoral students so that they will progress successfully through the program.

Selected Literature Background

The background literature relates to the major skills necessary for students who are attending a doctoral program with a major theme of global sensitivity. In addition, a new model was developed that formed the basis for the global leadership program at Pepperdine University. The major themes found by this study were utilized in the formation of the Schmieder Global Mindset Inventory . This inventory is given to all incoming doctoral students.

In the article Developing the Global Leader, (Schmieder-Ramirez 2012), utilized the conceptual framework of Katz (1974). Katz stated that the ideal leader possessed three major areas of skills: the conceptual, the interpersonal and the technical. These skills are important but there are other character traits and skills which have assumed greater importance as we develop

more global ties. The study was done in order to design and implement a global leadership doctoral program for the global leader.

Three research questions from a prior study informed this paper:

- 1) What key knowledge and concepts, interpersonal character dispositions, and technical skills are important in the formation of a global leadership program for doctoral students as determined by over 130 peer-reviewed journal articles published between 1990 and 2012?
- 2) What are the common themes of course content related to knowledge and concepts, interpersonal character dispositions, and philosophical statements of 18 well-considered Organizational Leadership Doctoral Programs with global themes?
- 3) Based upon the opinions of 25 Organizational Leadership professors, what are the most important themes that must be present in an Organizational Leadership Doctoral Program which must be in the curriculum?

(From Developing the Global Leader: The new EdD Organizational leadership Program model of the Future)

Table 1

**Key Knowledge and Concepts Related to Global Leadership found in 130 Journal Articles
1990 to 2010**

Knowledge/Conceptual	Technical Skills	Interpersonal Skills
1. Knowledge of change models	1. Understand the technical issues related to strategic planning	1. Ability to have and communicate a vision
2. Understand different theories of leadership	2. Ability to utilize appropriate technology	2. Ability to engender trust
3. Understand the role of context/environment in successful leadership	3. Ability to know and understand organizational structure.	3. Ability to inspire, empower and transform others.
4. Understand how adults learn	4. Understand the laws surrounding an organization	4. Ability to be creative
5. Recognize how leadership is contextual	5. Understand fiscal requirements, both internal and external to the organization	5. High level of self-esteem, and emotional intelligence
6. Substantial knowledge of the field	6. Know how to design and manage infrastructure	6. Good speaker and writer
7. Understand cultural and SPELIT* forces	7. Know how to manage human resources	7. Intellectually capable
8. Understand how to design and implement strategic planning	8. Know how to analyze data in order to support decisions	8. Intrinsically motivated
9. Understand the theory of power	9. Know how to analyze the external environment from a technical, intercultural, legal, economic, political, and social point of view*(SPELIT)	9. Ability to relate personally to others
10. Understand goals/objectives/assessment	10. Understand every technical aspect of the leader's "business".	10. Ability to problem solve creatively

Source: Schmieder-Ramirez, J (2012). Developing the global leader: The new EdD organizational

leadership program model of the future. Scholar and Educator Vol XXXI, 2012

This table shows the common themes in the literature related to being a global leader. These are also the themes which should be incorporated into the program.

Common Themes of Course Content from organizational leadership doctoral programs

Eighteen doctoral level courses were studied which contained themes related to global leadership. It is interesting that the primary themes fell along conceptual/knowledge and technical themes rather than psychological/sociological themes.

Table 2

Conceptual/Knowledge	Technical Themes
1. Change Theory	1. Instructional Technology
2. Critical analysis and synthesis of information related to leadership	2. Managing fiscal resources (macro and micro economics)
3. Implementation of leadership plans	3. Managing human resources
4. Strategic planning knowledge	4. Quantitative research
5. Learning organizational theory	5. Qualitative research
6. Teaching and learning theory	6. Action research
7. Adult learning theory	7. Adult learning theory
8. Planning and envisioning for the future	8. Implementing technology in educational organizations
9. Theories of human development	9. Socio-economic context of education
10. Organizational behavior	10. Managing human capital

Source: Schmieder-Ramirez, J. (2012) Developing the global leader: The new EdD organizational leadership program model of the future. Scholar and Educator Vol XXXI, 2012

The eighteen doctoral level programs studied utilized phrases on their websites such as: “prepare students to become visionaries,” “prepares students to become transformational leaders,”

Table 3

Top Ten Qualities Necessary for an Effective Global Leader based on the Opinions of 25 Ed.D. Professors

Concepts/Knowledge	Technical Knowledge	Interpersonal Knowledge
1. Understand the concept of change	1. Understand one's product and service	1. Ability to establish a vision
2. Understand adaptability to change	2. Understand organizational processes	2. Honesty
3. Understand one's client/market	3. Understand tools and technology	3. Good communication skills
4. Creativity	4. Understand the infrastructure	4. Listener
5. Passion for discovery	5. Understand virtualization, groupware, and cloud computing	5. Ability to engender trust
6. Understand the environment	6. Database management/analytics	6. Relationship Builder
7. Understand leadership and organizational theory	7. Ability to write well	7. Ability to inspire
8. Understand what's possible	8. Ability to conduct research	8. Transparency
9. Understand data	9. Ability to collect and synthesize data	9. Follow through
10. Ability to create a strategic plan	10. Strong understanding of research methods	10. Integrity

Source: Dr. June Schmieder-Ramirez, 2012

Focus of this paper

The focus of this paper was on the application of the Schmieder Global Mindset Inventory. This inventory is taken at the beginning of the doctoral in organizational leadership program during orientation and is taken a second time after the immersion trip to either Belize or China.

The inventory assesses the level of the students in terms of:

- Ability to cope with ambiguity
- Understanding of both Western and Eastern philosophies
- Ability to understand strategy and how to change strategy when needed
- Intercultural sensitivity
- Ability to envision a plan

Findings of the Study

Fifty-seven entering doctoral students took the Schmieder Global Mindset Inventory in August of 2015. The inventory has a scale as follows:

1. Score: 203 and up: **Realized:** This individual has many global experiences. The individual is comfortable with ambiguity and taking risks. This individual is comfortable in being a global leader. **30 students were at this stage.**

2. Score: 182-202: **Emerging:** This individual is emerging in their role as a global leader. The person is moving toward being more comfortable with more ambiguity. This person is more at ease than the growth stage. **22 students were at this stage**

3. Score: 159-181 **Growth:** This person is in the “growth” stage of global leadership. This individual is still thinking through issues of ambiguity and risk-taking. **5 students were at this stage.**

Conclusions:

The majority of students admitted to the doctorate in organizational leadership were at the “realized” stage of having a global mindset. A very small number of students are at the

“growth” stage of possessing a global mindset. The students in the doctoral organizational leadership program are overwhelmingly in the “realized and emerging” stages of global leadership. It will be interesting to see where they are after an international experience so that will be added to this paper in the late summer of 2016.

Appendix

Schmieder Global Mindset Inventory

Can be obtained at the address below

Explained at International Center for Global Leadership

Annual conference July 21-25, 2016, Belize

www.icglconferences.com

Dr. June Schmieder-Ramirez

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Schmieder-Ramirez, J. Mallette, L. (2008) *The SPELIT Framework*. Amazon Publishing.com.

ROLE OF ORGANIZATION IN MOTIVATING EMPLOYEES

Presented at the International Center
for Global Leadership Conference
July 2015 – Placencia, Belize

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Abstract

The field of Organizational Behavior has continually examined the subject of motivating adults in the workplace, and has pulled research from such disciplines as psychology, education, sociology, and economics to understand the various factors which keep employees motivated in an organizational setting. With companies facing an increasingly competitive market, attracting and keeping top talent and the need to have an engaged workforce to achieve successful results, has placed greater emphasis on the importance of motivation in the workplace. Organizations have implemented numerous approaches including leadership engagement techniques, reward programs, and performance incentives to motivate employees in recent decades. Companies create reward programs to include a variety of enticements to encourage motivation. Providing an assortment of motivational attractions demonstrates the variance among individuals' personal ambition. Due to a spectrum of motivational elements an organization is challenged to evaluate what motivates employees and how they remain engaged to excel in their position. There are multiple motivational theories and philosophies which support initiatives organizations introduce to its personnel. One could argue if it is the role of an organization to motivate its employees or if it is the responsibility of the individual to come to work motivated.

Keywords[motivation, organization, employees]

Introduction

From executive leaders to front line employees motivation in the workplace is central to organizational effectiveness. This paper will discuss theories of motivation and examine if strategies taken by organizations boost employee engagement to influence behavior patterns and maximize optimal results. Also highlighted is the difference between intrinsic and extrinsic rewards and the impact each has on an individual's motivation and performance. Further examined is a framework of personal motivation and the innate motivation of humans. Finally, outlined is a method which enables organizations to proactively select motivated employees.

Motivation Fundamentals

Motivation has been widely researched in psychology and through studying the differing aspects of motivation a better insight into human behavior has been reached. Robbins and Judge (2014) define motivation consisting of measureable qualities as “the process that account for an individual's intensity, direction, and persistence of effort toward attaining a goal”. This definition is geared towards motivating people in the workplace, so simply stated the three strategies evaluate how hard someone works (intensity), when a goal benefits the organization (direction), and how long a person can continue working (persistence).

There are two types of motivation commonly referenced: (1) intrinsic and (2) extrinsic. Intrinsic motivation reveals the desire to do something because one finds it pleasurable. In these instances an individual is not concerned with external rewards and would be satisfied to perform a task based purely on intrinsic motivation (i.e. writing a novel because a person enjoys writing). Extrinsic motivation indicates the desire to do something because external rewards are valued,

such as money or recognition. In the cases a person may not be fond of the activity, however, seek to attain the external reward (Robbins and Judge, 2014).

Maslow's Hierarchy of Needs Theory

Abraham Maslow categorized two facets of human need as physiological and psychological, and notes a person's instinctual urge to satisfy those needs are based on a hierarchy. If these needs are not satisfied then strain can form in the life of an individual. The five needs are separated into lower-order needs (physiological and safety) and higher-order needs (social, esteem, and self-actualization). Through realizing which need motivates an employee the manager can address fulfilling that need. Once that need has been satisfied an individual moves to the next level on the hierarchy. Although applying this theory has not been proven effective in companies, it is widely recognized, easy to understand, and used by management (Robbins and Judge, 2014).

Herzberg's Two-Factor Theory

Another motivational theory constructed by Frederick Herzberg investigated the relationship between the employee and their working environment. He classified two sets of factors which influence motivation in the workplace. The first set is labeled as hygiene factors. These are elements which include the ability of management, income, working conditions, company practices, and job security. Hygiene factors do not affect motivation, but can cause dissatisfaction. The second set of factors is referred to as satisfiers or motivators. The satisfiers consist of promotion, increased responsibility, recognition, and development opportunities. Herzberg research revealed removing dissatisfying aspects of a person's job does not necessarily translate to a feeling of satisfaction, but determined satisfiers are central to job satisfaction and motivation.

Intrinsic vs. Extrinsic

An established debate over the negative impact rewards has over an individual's performance, particularly long term implications has been studied in numerous environments (Benabou and Tirole, 2003). Information collected on campaigns focused with changing people's behavior found that offering external rewards were negative-reinforcers long term.

Kohn (1993) surveys the results from a variety of programmes aimed at getting people to lose weight, stop smoking, or wear seat belts, either offering or not offering rewards. Consistently, individuals in "reward" treatments showed better compliance at the beginning, but worse compliance in the long run than those in the "no-reward" or "untreated controls" groups. (Benabou and Tirole, 2003, p. 490)

Additional research has shown that rewards linked to extrinsic motivation conflict with a person's intrinsic motivation and the need to complete a task without incentive.

According to Fowler (2014) the extrinsic-intrinsic model proves the fallibility of traditional motivation methods and explains that intrinsic motivation alone cannot be sustained throughout an individual's workday. Fowler further describes having "developed values, meaningful goals, and a sense of purpose enables people to take advantage of the benefits of intrinsic motivation" (Fowler, 2014), although the former are not simply intrinsic. Common extrinsic rewards include benefits packages which offer healthcare insurance, retirement plans, stock options, merit increases and bonus payouts. Extrinsic rewards also go beyond monetary compensation to enhance performance or promote compliance with company policy and procedures. Furthermore, organizations take into account privileges employees place value on, such as flex-time, telecommuting, and job rotations and assignments (Robbins and Judge, 2014).

Personal Motivation

Acknowledging that personal motivation differs from person to person will enable leaders in organizations to modify tactics used to engage employees. Standard reward programs or motivational leadership techniques will not be effective for all individuals. A few customary motivational myths which are believed to be true are the following: some people are born without motivation, smart and competent people do not need to be motivated, and higher salaries result in higher performance. Based on research there is agreement that human beings have an innate characteristic to thrive, so individuals are naturally motivated. This strengthens the notion that people have a range of motivating factors which are unique to the individual. Research has shown a correlation between high self-confidence and an increase in an individual's motivation to take on projects and persevere in achieving set goals (Benabou and Tirole, 2002). This is also linked to strong performers and high self-esteem. These people deemed stellar performers have a propensity to take on more risk than their counterparts, and feel more comfortable in unfamiliar situations (Benabou and Tirole, 2002).

When employees are governed by a positive sense of well-being their engagement level increases, therefore performing at higher levels than anticipated. Additional results generated through positive behaviors of an employee involve uses of discretionary effort on behalf of the organization, endorses the company and its leadership to others outside the organization, employs altruistic citizenship behaviors toward all stakeholders, and stays with the organization (Fowler, 2014).

Every day, your employees' appraisal of their workplace leaves them with or without a positive sense of well-being. Their well-being determines their intentions, and intentions are the greatest predictors of behavior. A positive appraisal that results in a positive

sense of well-being leads to positive intentions and behaviors that generate employee engagement. (Fowler, 2014, location 270)

Starting in the Recruiting Phase

In many organizations the emphasis of hiring the right people for the right job is a focal point in recruitment efforts. If motivation is inherent within an individual it is essential for companies to bring on board employees who not only have the necessary skill set and experience for the position, but embody the organization's core competencies along with the ability to be immediately engaged in the learning process as a new hire. The employee's willingness to share his/her talents, along with an aptitude to learn in their new role displays an intrinsic motivation towards achieving proficiency (Fowler, 2014).

In the recruitment process some organizations require valuation surveys be completed during the application process to gage the candidate's level of motivation in various areas. Through this assessment tool organizations are aware of what stimulates and motivates a potential employee. The company can use this evaluation instrument as one of its means to determine if an applicant will be a good fit for a position in the organization. The tool can be particularly useful for organizations which are expanding, encountering a transitioning workforce, or just building from the ground up. If methods to assess future employees are properly executed then the organization can align the motivation of its staff to engagement strategies.

Conclusion

Various leadership attributes include the ability to establish a vision, good judgment, strong character, crisis management skills, sound decision-making capacity, and high emotional intelligence. One additional competency which is equally important for leadership is to understand the motivational dynamics of their workforce and design an engagement scheme accordingly. It is imperative that organizations integrate a framework which encompasses a holistic approach leaning on both intrinsic and extrinsic motivations, since at times one method bolsters the effect of the other. There are numerous ways leaders can engage employees through supporting open communication, reinforcing positive behavior, recognizing accomplishments, and involving employees in decision-making (The Guardian, 2013). The organization can also take steps to engage employees by granting flexibility when possible, offer training and development programs, clearly define the role of the employee, establish a model for career advancement, and recruit and hire motivated individuals. Motivating employees can prove challenging at times, but if companies hire the right type of employee for its business and deliver a working environment that supports an individual to stay motivated, success is around the corner for the person and the organization.

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FOSTERING RESILIENCE

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Many cultures and communities around the world delight in sharing stories about their historical and contemporary heroes. These heroes are the individuals that appear to rise up amongst everyday humans and in spite of the numerous challenges and great odds working against them, manage to survive and emerge as victorious. They find themselves facing adversity and circumstances that could be overwhelming and instead of giving up, they draw from their resources either internally or externally for perseverance to move forward. Fictional literature is laden with many stories of heroic protagonists that are successful in emotionally connecting and appealing to people of all ages, ranging from mythology to modern day storytelling. A fictional character such as Katniss Everdeen, the protagonist from The Hunger Games series, written for the adolescent reader, is a prime example of an everyday and ordinary teen aged girl placed in extraordinary circumstances and forced to draw deep from within as well as take direction from those supports around her in order ensure her survival and the survival of community (Collins, 2008). Contemporary media also highlights many such extraordinary individuals, including Bethany Hamilton, an award winning professional surfer that resumed competing professionally after losing her arm to a shark attack at age 13 and Aron Ralston, a rock climber pinned underneath a boulder in 2003. He possessed the ability to remain alive in the most dire of circumstances, to amputate his own arm, and then rappel back to safety after being trapped for

several days (Shellman, 2011). These acts of extraordinary strength and survival are linked directly to the emotional capacities of showing resiliency and possessing high self-efficacy.

The word resiliency comes from the Latin word *resiliendum*, which means to spring back or rebound and show the ability to gather up strength and resources to overcome adversity (Low Dog, 2012). It is common and derives from the basic human ability to adapt to new situations (Watson & Yuval, 2013). Resiliency is also defined as the ability to go through difficulties and regain a satisfactory quality of life (Peres, Moreira-Almeida, Nasello, & Koenig, 2007). It is the ability by individuals to cope effectively with difficulties that might otherwise lead to anxiety, depression, withdrawal, physical symptoms, or poor achievement (Harvey, 2007). The presence of this attribute may provide a basis for individuals to recover from traumatic events and stressful experiences more efficiently and in less time. While these are powerful and effective traits in an emotional composite, often times humans struggle to move forward towards recovery. Resilience is a skill combining many common components that can be fostered and cultivated with support from others. It is imperative in both the personal lives and professional realms of individuals facing varied levels of trauma to identify and implement the traits and techniques necessary to bounce back and recover quickly. The more resilient approaches and habits that an individual develops, the stronger their ability to weather the adversities of life (Harvey, 2007).

Resiliency Traits

Researchers across different disciplines and studying human behavior at various stages of life have identified traits consistent amongst individuals demonstrating resilience. These individuals have not been spared adverse experiences or traumas in life and have demonstrated certain attributes and beliefs that lend themselves to a positive and timely recovery. How resilience is developed may be based on the way that individuals interpret and process an

experience. Therefore, the first of these attributes includes the embodiment of a strong positive attitude, along with a sense of optimism, and an increased sense of hopefulness. When highly resilient people become traumatized or mired in a stressful situations, they may often look for a new sense of meaning and purpose in their life (Peres, Moreira-Almeida, Nasello, & Koenig, 2007). They do not remain stagnant or fixed in the root of their negative experience. By remaining hopeful and not defining the total essence of their life rooted in trauma but instead, viewing the traumatic event or stressor as an isolated aspect or experience of their quality life which is grounded in meaning allows for quicker recovery and reframing back into more positive thinking. The goal then, becomes decrease of despair and helplessness and an increase in hopefulness and meaning making in their lives.

Dr. Viktor Frankl, the internationally renown clinical and theoretical psychologist, details his ability to reframe his thinking to reestablish positivity and find meaning through a life of servitude to others after surviving the atrocities he personally experienced as a concentration camp prisoner during World War II. In his book, *Man's Search For Meaning*, he give a first hand account on suffering and how it is given meaning through the way in which a person chooses to respond to it. He comments about the basic human right to choose how to respond to any given situation and that a person "may remain brave, dignified and unselfish, or in the bitter fight for self-preservation, he may forget his human dignity and become no more than an animal...but even one such example is proof that man's inner strength may raise him above his outward fate." (as cited in Frankl, 1959, p. X). He explains that in spite of uncontrollable events and challenges in life, hope does not subside so long as the freedom of choice in how to respond remains in the forefront of the mind.

Another attribute supporting resiliency combines the desire by individuals to persevere and cultivate a strong sense of self-efficacy. Self efficacy is defined as the belief in one's capabilities to achieve a goal or an outcome (Margolis & McCabe, 2006). It is grounded in the belief system that quitting is not an option and that when there is a desire to succeed, an opportunity can be created. Self-efficacy is instinctual in some individuals or can be cultivated over time as a result of self reflection and internal inquiry. It is evident in children when the desire to succeed supersedes the negative feelings associated with failing. For example, in a research study conducted with school-aged youth identified with Attention Deficit Hyperactivity Disorder (ADHD), the participants developed a keen awareness of their own learning styles and how they applied strategies to overcome failure. Students noted the pain, humiliation, and isolation experienced in school-based settings and how over time, they cultivated a process internally to know when to implement positive strategies shared with them in direct teaching or counseling sessions so that they could avoid the negative feelings associated with quitting. They learned to recognize their internal cues and respond to challenging situations appropriately in an attempt to yield a positive outcome as a direct result of a choice made. As noted in Litner and Mann-Feder (2009), "they (the students) exhibited a common resolve to focus on positives and avoid quitting, a powerful drive to persevere, prove their self worth and succeed, and an inner assuredness of their own competence despite the academic difficulties they continued to encounter, even now in university" (p 37). Similarly, some groups faced with adversity prefer to seek the empowerment from within rather than have answers imposed on them externally (Mayberry, Pope, Hodgins, & Hitchenor, 2010). Shellman (2011) describes the sense of confidence fostered by participants in an outdoor survival education experience. Their opportunity to achieve success in this environment increases self-efficacy to face the demands in

other areas of their life. It is not uncommon to hear participants remark that if they can do a certain task in this outdoor experience such as climb a steep mountain, then they can handle the demands of other daily challenges, such as handling the stressors of everyday life and attending school. By allowing struggling individuals or groups the opportunity to self-reflect and chart a course for themselves based on what they already know or have learned, self efficacy is promoted along with a sense of goal achievement.

Another trait evidenced by individuals with resilience is the ability to cultivate and sustain supportive relationships with those around them. These relationships become instrumental in times of crisis. For some, it is the presence and availability of a caring professional, family member, or friend to listen and help that supports the building of self efficacy and reduction of stress (Siqueira & Diaz, 2004). Children and youth dealing working through traumatic family events, are encouraged to seek out counseling support in an attempt to establish a safe communication resource that is not grounded specifically in the familial structure. Thomas and Gibbons (2009) note that additional stressors on adolescents dealing with the challenges associated with domestic life changes, such as the divorce of parents could impede learning and success in school and further influence career and vocational goals. Many resilient children and adolescents weathering through similar situations employ a professional counselor or seek out an objective third party to maintain support and receive validation for their thoughts. This behavior is strategic and is recommended when anyone experiences crisis on a regular basis or is processing through the aftermath of a traumatic experience.

For most individuals dealing with such challenges the cultivation of a support team of comprised of family, friends, or mental health professionals is movement towards a healthy dependency on others when physical demands are too great or health issues arise. Johnston,

Bailey, and Wilson (2014) discuss the fine balance that families experience when working with aging parents and the delicate approach of creating support systems and redefining the parent-child relationship. Often times older members attempt to isolate family and not reach out for necessary support when faced with the challenges of aging. They do so to preserve a sense of autonomy and self reliance. While some individuals promote resiliency through developing independence, for others it is appropriately developing a healthy interdependence on those around them that will enhance their survival. It is the notion of personal agency and establishment of transparent, open lines of communication that aides to sustain individuals in these times of crisis. True support and trust in others is fostered by consistency in word and deed, in how support is exchanged, and in how it manifests into a positive experience for the traumatized individual over time (Johnston, Bailey, & Wilson, 2014).

Resilience and Global Leadership

Trait studies have found a positive correlation between individuals that demonstrate high levels of resilience and hardiness and their success as global leaders (Bird, 2013). Personalities that remain positive have egos resilient enough to accept a contentious political environment, while their negative counterparts may be overburdened by being subject to frequent criticisms (Boyer, Hudson, & Butler, 2013). As an overarching self-competency trait, resilience is linked to other characteristics described in strong leadership such as resourceful, emotionally balanced, hardy, stable, and realistically optimistic (Bird, 2013). It also has a behavioral component in which resilient leaders manage activities and lifestyle choices that reduce stress and facilitate effective recovery. Global leaders must show tenacity, strong coping mechanisms, and timely recovery when faced with adversity and struggle. Since leadership sheds influence and creates

culture within an organization, there is need for a balance between the demands of a leadership role and the maintenance of a grounded personal life (Maier, 2007).

Recommendations to Promote Resiliency

In the promotion of resiliency and the ability to weather stress or survive trauma, the physical and emotional aspects of health must be considered. Low Dog (2012) along with Watson and Neria (2013) emphasize the need for choosing sound nutrition and staying physically fit over time. Limiting the amount of caffeine intake, establishing healthy sleep habits and building an awareness of food and its properties also promotes well being. Food choices and the behaviors surrounding eating should support balance and homeostasis in the physical body. Children and adults need to regulate consumption of highly processed, high-glycemic-laden foods that can possibly lead to negative physiological developments, including but not limited to insulin resistance, heart disease or diabetes.

The connection between physical and mental health is not often communicated to adolescents in families dealing with crisis (Siqueira & Diaz, 2004). Exercise is also a stress and tension reliever as well as mood lifter. Individuals showing greater levels of physical activity demonstrate more resilience at a cellular level in the brain (Low Dog, 2012). For those individuals requiring structure and consistency to address improvement of physical goals, the development of wellness plans and strategic goal setting help to provide focus and measure tangible results. The domains could include overarching headings such as physical health and nutrition, exercise logs, and school or work related pursuits. By writing specific objectives and goals and working towards accomplishment, stress is lowered and the opportunity to foster resiliency increases (Curry and O'Brien, 2012).

Emotional health is also a huge factor in fostering resilience and build self-efficacy while managing stressful conditions. Maintaining positive relationships and seeking out positive role models is important for youth and adults alike. Conversely, being able to eliminate or minimize contact with negative individuals, including family members or friends, can at times be a difficult task. Saulsberry, Corden, Taylor-Crawford, Crawford, Johnson, Froemel, Walls, Fogel, Marko-Holguin, and Van Vorhees (2012) recommend skill modules and direct instruction by trained professionals to teach participants how to identify and resolve relationship problems. They also recommend teaching community members or students how to identify and counter pessimistic and irrational thoughts. Those newly attempting to build resiliency can learn basic problem solving and conflict resolution skills and how to anticipate and plan responses when in such difficult situations. Brooks (1994) recommends creating concrete opportunities for those struggling with resilience, especially children, to show capacity building and earn respect from others. Watson and Neria (2013) suggest finding a mentor or seeking help by utilizing professional counseling-based services for problem solving. Each of these strategies are part of the implementation of social supports geared towards the promotion of building resilient individuals.

Emotional health also relates to personal perspective and fostering a positive attitude, even in the midst of adversity. Resilient individuals battling everyday stressors have a healthy emotional composite and are able to see the traumas in their life as the natural challenges associated with a meaningful life. They are able to learn and grow from adversity and develop a sense of grace and dignity (Watson and Neria, 2013). Seeking out spiritual direction as a source of support is recommended when the experience provides a cognitive framework that decreases suffering and strengthens a sense of purpose and meaning (Peres, Moreira-Almeida, Nasello, &

Koenig, 2007). Another way to manage stress regulation and and promote resilience is the use of humor. Humor is a communication skill used to amuse others and communicate in a light-hearted manner. Humor provides an opportunity to cultivate and sustain positive personal and work relationships. It can also be implemented to reduce interpersonal conflict (Besser, Luyten, & Mayes 2012). Lugg and Boyd (1993) emphasize the importance of strong communication in the workplace and recommend that individuals create positive alliances and groups establish a collaborative culture to minimize stress and encourage resiliency. It is these approaches to physical and emotional health that will foster a sense of resiliency and provide tools for success over time.

Conclusion

Resiliency is defined as the ability to adapt and continue to flourish despite difficult or unfavorable circumstances (Shellman, 2011). Stressful situations and trauma occur in many aspects of life, including the workplace, the community, in families, and in schools. Empowering children and adults to weather challenges and recover in an appropriate and timely manner is a noble and necessary requirement to move forward as citizens of the 21st century. The ability to either receive or draw from emotional supports to cultivate resilience begins by establishing a strong physical and emotional balance. Even if an individual has a strong instinctual level of psychological resilience, the emotional and physical climates must be conducive to healing and moving forward. As needs change over time and challenges present themselves, the traits of self efficacy, positive communication, building relationships, preserving autonomy, and finding meaning in life remain as the cornerstones for fostering resiliency. Resilience lends itself to attitude and attitude shapes how individuals act. As Dr. Viktor Frankl exemplified throughout his life and his professional calling, “A positive attitude enables a person to endure suffering and

disappointment as well as enhance enjoyment and satisfaction. A negative attitude intensifies pain and deepens disappointments; it undermines and diminishes pleasure, happiness, and satisfaction” (Frankl, 1956, p. 160). If resiliency is not inherent to struggling individuals, the beauty and fullness of human life yields opportunities and strategies to cultivate it over time.

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THE BOARDING SCHOOL HEAD: GLOBAL MINDSET AND CULTURAL INTELLIGENCE

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Abstract

Many independent boarding schools in the United States define themselves as global communities that represent students from many different countries. The Association of Boarding Schools (TABS) and the National Association of Independent Schools (NAIS) believe diversity is a critical ingredient for school health. This characteristic is achieved as many boarding schools are competing across international borders to build a heterogeneous group of students at their schools. Because of this, boarding schools require leaders whose experiences and abilities allow them to realize the goals of the organization while incorporating the voices of the multicultural community that they lead. The development of a global mindset is crucial, and working in a boarding school is one way that this type of mindset can be developed.

Cultural Intelligence is also critical for the boarding school leader, since it gets to the core values of multiculturalism by being sensitive to values and beliefs of a people or society. Using global mindset and cultural intelligence as key attributes of successful leaders, this paper will explore how heads of schools of the future will need to be globally minded in order to best serve their community of learners. Because research of boarding schools heads is limited, leaders in many fields will be examined as examples of those who have succeeded in multicultural

leadership positions.

The purpose of this paper is to show the importance of developing a global mindset in boarding school leaders. The role of cultural intelligence in developing a global mindset will be examined as well. Additionally, a brief review of the literature on defining a global mindset as well as the term of cultural intelligence will be explored. The paper will then conclude with a case supporting the importance of having a global mindset and being culturally intelligent as the head of a boarding school in the United States.

The Boarding School Head: Global Mindset & Cultural Intelligence

Leadership and being able to lead organizations with different cultural dimensions has become a focal point for businesses during the last several years. Friedman (2006) wrote when interviewing leaders of companies that many of them could not believe what they had been able to accomplish in “the last couple of years.” Of course this has been due to the Internet and other explosions in technology as Friedman (2006) noted; however, one of the main factors is that the entire planet is now doing business with each other. Because of this, leaders of every kind of business need to develop a global mindset and increase their level of cultural intelligence.

This is no different for independent boarding schools. With a climbing international population of 15% of total boarding school enrollment in TABS (The Association of Boarding Schools) member schools, (TABS, n.d.) leaders within independent boarding schools should be aware of how to best interact, communicate, and lead an internal school community while ultimately doing business with an external global community. Leaders of these schools have had

international students in their communities, for quite some time, with the tacit acknowledgement that improving multicultural understanding was important for overall success.

McCall and Hollenbeck (2002) stated that leaders, especially those who are working within an international framework, are more likely to lead in more diverse, information-rich, and often complex environments. Independent boarding schools tend to be very diverse in terms of student and faculty population. Additionally, these schools are certainly unique and complex communities due to the fact that many of their members who attend school and work there also live on the school's campus. With this blending of backgrounds and cultures on one campus, the development of a global mindset in the leaders of these school communities will help them to meet the everyday demands of their jobs.

The role of cultural intelligence in developing this global mindset is closely related, since a familiarity and sensitivity to other cultures is advantageous when developing a broader outlook on others. Earley, Ang, and Tan (2006) defined cultural intelligence as an individual's level of cultural awareness during cross-cultural interactions and the processes that individuals use to acquire and understand cultural knowledge. With that in mind, this paper will explore both the importance of an independent boarding school leader having a global mindset and the need for cultural intelligence in enhancing that mindset. Additionally, an exploration of definitions and meanings for these two terms will be reviewed as well. Finally, the importance of incorporating this information into the daily life of an independent boarding school leader will be discussed.

BACKGROUND

The Jack Welch of the future cannot be like me. I spent my entire career in the United States. The next head of General Electric will be somebody who spent time in Bombay, in Hong

Kong, in Buenos Aires. We have to send our best and our brightest overseas and make sure they have the training that will allow them to be global leaders who will make GE flourish in the future. (Jack Welch, “Speech to GE Employees,” 1997. as cited in Molinsky, 2013, p. xviii)

Jack Welch’s words carry weight and wisdom, as the leaders of almost every type of business in the United States have to deal with a clientele that is increasingly international. Although independent boarding schools are still mostly domestic in terms of their populations, and certainly have had international students for decades, many of these institutions are still seeking students to attend their schools from the far reaches of the globe. Because of this, administrators and teachers need to be sensitive to the needs of this portion of their populations, as well as the needs of the diverse domestic students that make up their student bodies.

As Barber (2003) wrote, the international students that have been seen in recent years are coming because they want to learn English. In years past, they may have come to experience the American system of education, and while they still respect that system, it is English that is the main motivator. Schools are seeing this today as students from around the world are seeking admissions into independent boarding schools in the United States to learn English, and hopefully get accepted into colleges and universities there. With international students still being motivated to attend high school in the United States, the independent boarding school leader should purposefully develop a global mindset in order to better serve the community that they lead.

GLOBAL MINDSET

The term *global mindset* has been proposed by various researchers as a method to attain a greater understanding of ways to appropriately interact with others across various cultures. It

seems that more than ever, successful businesses are ones that widen their borders and do business with an ever increasingly diverse group of customers. Combine this with a world climate that has China and India poised as economic leaders, ongoing issues with Russia and Ukraine, a Middle East that has constant unrest, economic meltdown in Greece, and fighting over immigration policy in the United States and we have no choice but to turn to towards leaders who can succeed across cultures. Globalization has become a key area of interest, and a global mindset is needed to meet the demands of a turbulent and increasingly connected world.

The *Financial Times Lexicon* defined global mindset as “an openness to and awareness of diversity across cultures and markets with a propensity and ability to see patterns across countries and markets” (“Definition of global mindset”, n.d.). In looking at successful leadership across cultures, this author would argue that a global mindset could help to bridge the differences in cultures present within an organization or school community because of the understanding of perspectives that each member of the community brings to the organization. The perspectives speak to the awareness and openness part of the definition provided by the Financial Times, and taking this one step further, a leader operating within such an environment could hopefully see patterns which would allow him/her to be successful in communicating and leading a culturally diverse school or business.

The development of this global mindset in leaders is critical. As McCall and Hollenbreck (2002) suggested, “We believe that this mindset comes not from home-country leadership challenges, but rather from experience in other cultures” (p. 105). McCall and Hollenbreck went on to state that the development of a global mindset should require an individual to learn one other language other than their own and live for a period of time in at least one or two other countries (McCall & Hollenbreck, 2002).

This definition of global mindset is closely linked with *global dexterity*. Molinsky (2013) described global dexterity as “the capacity to adapt your behavior, when necessary, in a foreign cultural environment to accommodate new and different expectations that vary from those of your native cultural setting” (p. 9). Here we see that in order to have a global mindset, one must have the global dexterity to be open, and adapt one’s behavior so that diversity can be understood and patterns of behavior can be somewhat predicted. The development of both traits is critical for the head of an independent boarding school and living in a diverse or even foreign culture seems to be an important step to an individual’s formation of these traits.

The final aspect of global mindset that is necessary for consideration in relation to the head of school, is its relationship to global leadership. Folkman (2014) recently found that “one-third of global organizations have identified ‘global leadership’ as a serious constraint.” Folkman (2014) went on to describe that although many companies have identified this as an issue, few have formal leadership development processes or training in place to correct the problem. Because of this, many organizations have a demand for overseas assignments, which are often times critical for an organization’s success.

This is also a problem that could occur in independent boarding schools. Although many independent boarding schools have students from a wide range of countries and cultures, many of its teachers and employees have not lived outside of the United States. This is through the author’s own experiences and observations, since very little research is available on the make-up of faculty in independent boarding schools in the United States. However, through 17 years of personal experiences at three schools and having colleagues at many others, this author is confident that faculty’s exposure to international experience will result in professional growth. This would be an interesting area for future study: To look at heads of school and their levels of

exposure to international cultures through travel and living experiences. The research would examine how a global mindset could be developed in the leaders of educational institution and could lead to a discussion of exploration of global leadership qualities and the incorporation of global dexterity.

Cultural Intelligence

Leaders need to know the differences in the attitudes, beliefs, and behaviors of other cultures in order to lead a global organization. Because of this, they need to possess the quality of *cultural intelligence*, which is abbreviated as CQ. Earley & Ang (2003) defined cultural intelligence as the ability to understand cultural norms from one culture to another so that an individual's behavior may be modified. Cultural intelligence is a necessary trait for leaders of independent boarding schools.

Many independent boarding schools have students representing a plethora of countries in their student bodies. For this reason, heads of schools and other professionals in these organizations should possess a high level of cultural intelligence in order to be successful in their daily interactions with students. For example, a classroom comprises a diversity of students who learn and have experienced school in a variety of ways. The job of the educator is to understand the differences in attitudes and behaviors of their students and then modify their own individual behaviors so that all students can meet the goals of the lesson for the day. This approach is a universal cultural approach to learning because when taking into account what each student brings to the classroom from their various cultural backgrounds, the teacher can then design a lesson plan that is sensitive to those backgrounds to facilitate the student's access to the presented material. As heads of schools are leaders of learning communities, they must be aware

of this critical trait that teachers should possess and allow for levels of cultural intelligence to increase among faculty members who are navigating an increasingly diverse group of students from around the world. These challenges could be addressed by incorporating global dexterity and cultural intelligence in employee's professional development. All of this development would help the employees of the school, and in turn the organization itself in improving its overall level of Cultural Intelligence.

“Increasing globalization across most industries has prompted observers to pay attention to the need for augmenting cultural intelligence in workers” (Alon & Higgins, 2005, p. 71). This recommendation seems to be no different for independent boarding schools. The previous example of having a universal cultural approach to learning is just one example since boarding schools are entrusted with not only their students living academic lives, but also their social, emotional, athletic, and artistic lives. While the classroom is the centerpiece of the academic program at any school, cultural intelligence paves the way for sensitivity, understanding, and adaptation in all facets of life that a student may experience on a day-to-day basis. With this in mind, independent boarding schools may want to look towards raising the school community's level of cultural intelligence.

Professional development in cultural intelligence is as diverse as the member schools of The Association of Boarding Schools (TABS). School associations do provide professional development at conferences and also workshops during the summer; however, the topic of developing Cultural Intelligence within a boarding community as a program or offering that is rarely presented. In the last few years, NAIS has partnered with TABS to offer a global symposium to address these types of issues. This symposium addresses a number of issues facing independent schools that are wrestling with issues arising from having many cultures present on

their campuses. While this conference is only in the first few years of its existence, events of this nature are important in developing and growing the level of cultural intelligence on boarding school campuses. Topics presented include issues regarding academics, admissions, marketing, fund-raising, residential life, exchange programs, and many more. Schools with international populations should look toward having their own internal programs on campus to be sure that faculty members have exposure to and an understanding of cultural intelligence. This understanding will also help to develop a global mindset within the organization.

Multicultural Leadership

Kingl and Zennie (2012) defined a multicultural leader as individuals who “are cosmopolitan and worldly, they have acquired the cultural sensitivity necessary to bridge cultures (even when working within the same country) and are able to conduct business effectively across national borders” (p. 1). The authors continued that although their research has shown these leaders as having the above qualities. The problem is that these individuals are not easy to find. In other words, we may have a shortage of multicultural leaders in the world today.

Carlos Gohsn, CEO of Nissan, is probably the most well-known example of a multicultural leader in business today. Gohsn once stated that his ability to succeed was aided by the fact that he is Brazilian and Lebanese, and by trade is a French engineer (Doz, 2013). Gohsn is certainly multicultural. He was fortunate enough to experience differences in culture in his formative years. What schools and organizations need to focus on are ways to develop that multiculturalism in its leaders and followers.

L’Oreal, a French company with divisions all over the world has worked towards making its mostly French company a multicultural one over the past two decades. As Hae-Jung & Doz

(2013) wrote, “The only alternative to internationalizing the structure was to internationalize the management team” (p. 115). Since L’Oreal was dealing with an increasingly diverse set of customers, it had to adjust its strategy. To achieve this goal, the company-employed individuals who had multicultural backgrounds and placed most of these employees in new product development to ensure that what was being produced could be sold not only to the French, but also to its increasingly diverse constituency. Training also occurs as employees “undergo a 12-month training program in Paris, New York, Singapore, or Rio, followed by management development programs” (Hae-Jung & Doz, 2013 p. 119).

The world’s largest aerospace company, Boeing, has over 300,000 employees in almost 30 countries around the world. Employees and their families who are placed on international assignments receive individualized and customized sensitivity training and cultural awareness courses. These courses are to ensure that employees are “not just landing in a country and getting introduced for the first time” (Chebium, 2015, p. 1). Chebium continued:

The company [Boeing] also arranges “lunch and learn” cultural talks, employee rotation programs to allow overseas staff to work for nine to 18 months in the U.S., and diversity summits twice a year in U.S. locations. Boeing’s leaders can also take the “passport series” of training sessions, which are structured and classroom-based. (p. 1)

Boeing’s approach to training and networking and L’Oreal’s strategy of hiring multicultural individuals while also providing employee training, are examples of how two multinational corporations were able to successfully increase the levels of cultural intelligence in their organizations. The company’s actions helped employees develop a global mindset. These two examples could be roadmaps for other organizations that are looking to increase their levels of cultural intelligence. Heads of independent boarding schools could also look to these

examples for ideas on incorporating similar practices into the professional development of their own faculty and staff.

Conclusion

Global Mindset can be briefly described as appropriately interacting with others from various cultures. To do this one must possess global dexterity, which is the capacity to adapt behavior and change when interacting with others. Finally, none of this is possible without a heightened level of cultural intelligence, which is the knowledge of different attitudes, beliefs and behaviors in other cultures. As was discussed in this paper, all of the above are important when interacting and leading a globally diverse school or business.

The purpose of this paper was to examine the importance of developing a global mindset in boarding school leaders. As previously stated, these schools have students from many different countries throughout the world (i.e., 20% of the students are international). Although examples of initiatives that schools have undertaken could not be found in the literature, it is the hope of the author that by showing examples from businesses in other industries, similar strategies can be employed at schools that wish to have a global mindset present in their communities. Since independent schools work with a constituency base that is increasingly international, a global mindset, high cultural intelligence, and global dexterity will only aid the leaders of these schools to achieve success.

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INTEGRATION OF A WORLD VIEW IN AEROSPACE EDUCATION CURRICULUM

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ABSTRACT: Meeting future challenges in aerospace education requires a greater understanding of the global aviation environment and their trends. Integration of different cultures, procedures, and methodologies into teaching concepts and curricula provides a broader student world view. According to the Department of Commerce (2013), Americans visited an average of 1.2 countries while UK residents visit seven in their lifetime. The U.S. significantly trails other countries in foreign travel and working or studying abroad, but it is expected to catch up within a students' lifetime. An analysis of aviation business practices, procedures, and policies in other countries has become increasingly important as opportunities for US citizens working abroad increases. Aerospace education can effectively respond to the increasing demand to integrate a global perspective within education programs. This abbreviated case summary presents an analysis of the current curriculum landscape and use of Lewin's Force Field change model to influence future curriculum development.

Statement of the Problem

The aerospace industry comprises numerous careers which require participation from a global community of professionals and a basic world view. Aviation programs in collegiate settings include such programs as security, professional pilot, aviation management, safety, and maintenance just to name a few. Superior offerings by United States institutions of higher learning have attracted large numbers of foreign students taking part in these programs. According to the latest US Immigration and Customs Enforcement statistics, over 1.1MM students are currently studying under an F-1 or M-1 visa (USICE, 2015). The majority of these students, 76%, come from Asian countries. Further analysis shows that three of the top five M-1 visa approved schools are aviation related (USICE, 2015). In contrast, the number of students from the United States in full degree programs overseas is 43,280 (Belyavina & Bhandari, 2012). Therefore we can conclude that the United States is training a large number of aviation related skills to foreigners who will be applying those skills in their native lands. Training American students for those same tasks and arming them with a world view could assist in providing additional options for students.

Explosive growth of aviation in foreign markets has created an opportunity for United States citizens to participate in shaping the global aviation marketplace. Despite the huge worldwide opportunities, collegiate programs fail to address the growing needs of students to provide a world view curricula. Specifically regarding aviation management, there is currently a global boom in airport construction. The United States currently has 19,729 airports (FAA, 2014). A series of recent high-profile airport closures similar to the unlawful midnight demolition of the Miegs Field runway may present an impression the number of airports is

decreasing. Contrary to popular belief, the number of airports has actually risen 2.5% since 2000.

While the U.S. has realized the economic benefits of airport construction and operation, the developing countries of Asia are quickly understanding their impact. The number of current airports globally is 41,821 according to the Central Intelligence Agency (2014). Using these statistics, China, with roughly the same geographic land area should have 19,000 airports. Latest intelligence has the entire country of China with 231 airports (CIA, 2014). India has 1/3rd the land area, but only has 454 airports (Sardeshpande, 2013). Each country has compelling evidence there is significant growth in aviation traffic and need for additional airports. India has publicly stated intentions to add 180 airports in the next 10 years and create a national aviation university (Government of India Planning Commission, 2012). These examples provide empirical evidence of unprecedented growth and a need for expatriate assistance in constructing and managing aviation assets.

A recent study of University Aviation Association member institutions of higher education revealed world view curricula present in only eight of 87 aerospace programs (Birch, 2015). In the absence of specific globalization emphasis, 13 institutions did have an opportunity for students to take foreign language as an elective (Birch, 2015). The issue remains a majority of the programs do not allow for globalization or language in their curricula. A lack of cultural diversification and understanding of foreign business trends in aviation signals a troubling issue in the connected global economy already present. Without a change in the approach to education taken by higher education leaders, U.S. students will continue to be limited in their growth potential and lack the marketable skills necessary to compete in a global market.

Literature Review

Integration of globalization concepts is not new to the aerospace industry. During the infancy of aviation as an industry, Huebener (1943) suggested the importance of foreign language education. Educational leaders understood the importance of a global world view as a way to not only prevent future conflict, but also as a means of economic dominance. Educational philosophers have also proposed an integrated world view curriculum in more recent years. Globalization and culture were a major theme of the reconstructionist movement in education to address emerging societal problems (Brameld, 1970). Unfortunately, the demands of many mandated educational curriculum components has reversed the gains seen in K-12 education related to globalization. Based on research conducted of higher education aerospace programs, it appears true at the collegiate level as well (Birch, 2015). “The future of the United States seems to be connected to globalization in that the welfare of the United States is tied to the welfare of other countries by economics, the environment, politics, culture, information, and technology” (Merriman & Nicoletti, 2007).

A meta-analysis of 71 articles of higher education globalization programs in human resources provides insight as to the depth of the problem. Little empirical academic study has been devoted to cross-cultural issues within the human resource academic program (Zachmeier & Cho, 2014). The lack of any measurable results from these studies underscores the overall effectiveness of collegiate level globalization curricula. A greater amount of world view curriculum research was conducted in management programs. Researchers investigated attitudes of business school leaders and found that a majority believe not enough globalization is taught in classrooms. The Advance Collegiate Schools of Business formed a task force to address the issue and found the following:

With regard to emerging global trends in higher education and cross-border business, the report reveals a sizable gap between what the world needs and what management educators generally do. Key areas for attention include the expansion of mechanisms for quality improvement and assurance globally, strengthening the use of international partnerships, more intentional internationalization within the curriculum, and connecting various global activities to one another through a comprehensive globalization strategy. (Bruner & Iannarelli, 2011, p. 232)

The issue is worse in aviation. As stated earlier, out of 100 University Aviation Association member higher education institutions only six had defined world view elements (Birch, 2015). It is particularly surprising considering aviation giants such as Boeing and EADS/Airbus manufacture parts in various global plants and assemble those parts within U.S. borders. The international space station comprises 15 countries where cooperation has occurred since 1998 (NASA, 1998). A lack of understanding may occur without globalization training for college graduates and their effectiveness lessened. Despite the lack of aerospace education world view options, the evidence presented in the literature demonstrates academic agreement as to the need for globalization curricula. In summarizing the general consensus of existing literature, “academic programs carry a particular responsibility” and a globalization component serves as the key (Cho & Zachmeier, 2015, p. 13).

Analysis of Aerospace Education Curriculum Using the Spelt Power Matrix

SPELIT is a theoretical framework to allow researchers gain a better understanding of the critical elements within a process or environment. The foundation of SPELIT is an analysis of the social, political, environmental, legal, intercultural, and technical foundation of an organization (Schmieder-Ramirez & Mallette, 2007). Other models such as SWOT provide a

similar analysis of strengths and weaknesses, however, to a much less degree of certainty than the more comprehensive elements proposed in SPELIT. In addition, the framework also provides the researcher a high degree of variability in the methodology and interpretation of the elements within the analysis. The six elements of the SPELIT framework are:

1. The social environment involves people-to-people interactions.
2. The political environment revolves around power.
3. The economic environment looks at the production and consumption of resources.
4. The legal environment involves contracts and the law.
5. The intercultural environment considers factors of collaboration in a global setting.
6. The technology environment interprets the advancements of the scientific revolution.

(Mallette, 2007, p. 28)

Social environment. The social interaction of the proposed curriculum change is entirely the intention of providing an increase in a programmatic world view education. Conversely the change in curriculum will require an intense social interaction between students, faculty, administrators, and accreditation agencies. Within aviation, there are numerous bodies that control the requirements within a program. The influence of a small group of influential educational leaders could provide a speedy change to the current lack of direction to affiliated programs. Most obvious would be the University Aviation Association (UAA) and the Accreditation Board International (AABI). The UAA is a voluntary non-profit that provides general guidance and advocacy for aviation education programs in the United States and abroad. There are currently 105 accredited colleges and university members. The organization has a standing curriculum committee comprised of 10 faculty members from member institutions. AABI has accredited 56 collegiate programs and a board of directors comprising a large cross-

section of aviation interests sets policy and accreditation standards. Based on analysis, the highest degree of opportunity resides with changing the curriculum at the UAA level first.

Political environment. The political environment associated with curriculum change is rich and broad. There is an inherent struggle between larger institutions with resources and those without. In addition, there is an added complexity of four year degreed, associate degree, and simple certification programs. A change in any policy governing the required elements of a course would be politically charged. However, the four year institutions have a disproportionate amount of power in the voting and policy making regarding curriculum. Any programmatic changes to include a world view would be met with political challenges. Internal politics also plays a role within higher education. The constant and epoch struggle between faculty, administration, boards of regents, and in the case of state funded schools – the legislators provide a formidable political challenge. Too many decision makers who are authorized to stall a process make the changes within educational settings a slow and arduous process. Monumental changes such as those proposed in a curriculum change are subjected to highly political and bureaucratic processes. Political environment risk represents the single greatest barrier to implementation of a world view in aerospace education curriculum adoption.

Economic environment. As with most institutions of higher education, costs of implementation and maintenance are always of concern. Additional manpower and systematic changes would be required to add classes applicable to globalization. As was described in the study of UAA programs currently in place, the wide range of solutions to address the goal were found. Purdue University required a zero-hour course that mandated a series of world view options (Birch, 2015). The zero-hour option provides no additional revenue, yet costs the institution time and money to administer. While this appeared to be the easiest solution to address

the requirement without spending additional degree plan hours on globalization courses, the lack of revenue to offset management of the program is problematic. Overhauling existing classes to include a world view also places the burden of lesson plan changes on the faculty. This could be the least costly alternative, but is inconclusive without further research. Without fully integrating a comprehensive set of world view classes into the curriculum, the lack of a revenue presents a significant hurdle to success. However, the additional revenue from an easy to deploy process may provide unexpected revenue to the program without significant investment.

Legal environment. The legal environment presents the least risk and opportunity to achieve the goal of integrating a world view curriculum. No federal or state law governs the application of a diverse cultural view into higher education. The only potential risk would be a backlash from the less politically powerful member institutions through legal action, but that is highly unlikely since some provision would most likely be put in place to exempt associates or certification programs. Therefore, legal presents no real risk or opportunities.

Intercultural environment. Intercultural environment serves as the most complex assessment. “The ability to respond to cultural differences is key to being an effective global leader in this environment” (Schmieder-Ramirez & Mallette, 2007, p. 9). While the element refers to cultures in an external environment, the greatest challenge is the culture within departments. In this dimension we are tasked with not only measuring the ability of the institution, but the people within it. The Intercultural Development Inventory assessment could provide an empirical measure, but there are no aerospace education programs that have completed this survey on initial investigation. Intercultural missions were found at five of the 100 UAA member institutions, however the presence of this element may not be immediately known through a curriculum study or cursory scan of program objectives. There is some

evidence to suggest that the mission of all higher education institutions meet the criterion. It would be further speculation that faculty and staff of these programs possess the ability to respond as stated in the definition. This is demonstrated through the diverse demographic statistics inherent to aerospace education programs. Mobilizing a workforce accustomed to global cultural sensitivity would make implementation of a world view curriculum easier. To assume the intercultural presence in any higher education program demonstrates a threat, yet the chance to deal with an open-minded, educated target population serves as the greatest opportunity.

Technological environment. Technological aspects of a curriculum change have some interesting implications for aerospace education curriculum. Due to the high number of students from active military backgrounds, these particular programs have a large enrollment of remote learners. The existence of this demographic using strictly online learning technology can be both a threat and an opportunity. Since many are already experiencing a global world view through geographic proximity, the ability for peer learning exists. However, technology has been identified as an untested tool when it comes to interpreting and disseminating cultural nuances. In the framework, technology will require attention to ensure the program is delivered in a meaningful way.

Proposed Aerospace Education Curriculum Change Theory

Aerospace is a tightly knit community whose participants are largely known by one another. This closed system approach to the industry provides benefits and challenges. Its scientific roots to STEM education translate to change coming about as a result of steady, proven, and verifiable data presentation. The industry also has a low tolerance to failure and is

often referred to as a high-reliability organization due its capability to suffer from failures rising to the level of organizational accidents. Theorists such as Schein (1983), Reason (1998), and Weick (1987) have identified aerospace as a dynamic organization requiring stable operations and systems. These inherent restrictions add further complexity to change occurring in any aerospace organization. Any change theory applied to aerospace must conform to this theoretical framework.

Lewin presented one theory which has been used in aviation prior and serves as one potential model to influence adoption of a world view in aerospace education. “The role of field theory and group dynamics was to understand how particular social groupings were formed, motivated and maintained” (Burnes & Cooke, 2013, p. 409). Force field theory contemplates the individuals’ perception of the world or their *life space*. Lewin developed the change theory to modify the natural resource consumption patterns of Americans during World War II (Lewin & Gold, 1999). As understood from social science, influencing consumer behavior on a large scale is perhaps the toughest test of change. While the literature supports a move away from the change theory due to increasing mathematical rigor, this may appeal to many scientific constituents in charge of collegiate aerospace programs. Considering the large amount of stakeholders and their propensity to resist change, Lewin’s Force Field model serves as the best opportunity to influence change. Successful change in aerospace education programs can occur with the sound development of a plan to address the four forces of sustained undesirable behavior, group dynamics, action research, three step model for change. A change plan to address UAA member institutions and members of the curriculum committee would be the first step in affecting change.

Conclusions

Academic institutions providing aerospace educational programs in the United States must address the lack of world view in their curricula. Advancement of a strong U.S. economy and workforce cannot rely upon xenophobic or isolationist policy at the collegiate level. Integration of a world view into aerospace education programs are essential to providing the current generation the tools necessary to understand and compete in the global marketplace. Significant challenges have been identified through the use of the six element SPELIT framework. Overcoming these challenges will require additional study and a unique and customized solution based on institutional situations. Many ideas have been presented in the literature and best practices from the few already integrating a world view into curricula.

By using Lewin's Force Field theory of change, higher education leaders can affect real change. It is incumbent upon the educational thought leaders to promote a world view in aerospace education. A world view in curriculum can provide a more balanced educational experience that will benefit future generations.

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TRANSFORMING ENTREPRENEURSHIP AND EDUCATION WITH COLOR ACCOUNTING

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for Global Leadership Conference
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ABSTRACT

Accounting has long-been coined “the language of business”. As such, it makes sense that those most likely to succeed in business will be those who have a command of this language. Unfortunately, however, decrypting the language of business is anathema for many people. From the world’s largest, most successful companies and international “Big 4” accounting firms to the smallest of micro-enterprises, business people frequently have trouble making sense of accounting. This paper introduces “Color Accounting” – a visual/tactile system of teaching accounting - and the potential for this learning system to transform lives of even the tiniest microentrepreneurs by making accounting information understandable and useable. In contrast to the variety of “accounting for nonfinancial managers” courses for people who have difficulty grasping accounting concepts, Color Accounting has the potential to convert the process of learning accounting into something life-changing and relevant. Color Accounting is being used in companies worldwide as well as in classrooms of tenth graders in South Africa with anecdotal evidence of impressive results.

Introduction

The purpose of accounting is to provide numerical financial information to support informed decision making. As such, if business people fail to understand accounting, this is a failure of the accounting educational methods. One of the results of this failure is the misconception that accounting is difficult and boring, largely because the discipline is full of technical jargon and what seems to accounting outsiders to be an archaic and unintuitive double-entry recordkeeping system. Another possible reason for people's fear and distrust of accounting is their fear of quantitative data in general. There have been numerous studies and reports which provide evidence that, similar to business people, students at the high school and college levels also find accounting to be boring and difficult. Consequently, a number of studies and reports have surfaced from within the accounting profession and those in academe calling for reforms in accounting education, the most recent of which being the Pathways Commission report (2012). Successes in implementing these reforms, however, has been minimal.

Discussion

The importance of accounting to the development of modern-day entrepreneurship and capitalism has not gone unnoticed by prominent social theorists. According to Carruthers and Espeland, the overarching theme of the claims of these theorists is that the emergence double-entry bookkeeping, capitalism, and rationality are linked, since accounting makes it possible to rationally analyze the consequences of past decisions, calculate available and forthcoming resources, and compare investment alternatives (1991). As such, the relevance of accounting to the success of business endeavors is not to be understated; however, this relevance does not make nonaccountants any more willing or able to exploit accounting's virtues.

The CEO & Board Practice at Heidrick & Struggles (2011) conducted a study of the career choices of Fortune 500 CEOs to discover the paths most commonly pursued by these CEOs in their marches to the top. Although one of the most common factors revealed by the study was the CEOs' development of strong financial acumen, often this development does not happen easily, or automatically. For example, the vice president of finance at a Fortune 1000 retail company recently lamented to the author about the lack of financial acumen in the top-level operational management in his company – and his embarrassment when one of these operational managers asked him in a board meeting to explain the concept of “gross profit”. Not surprisingly, the same can be said for small businesses, as related by Dahl (2011) who states that “...to run a business effectively, most owners need to have some understanding of their finances. It is entirely possible for a company to be profitable but fail anyway because it does not have enough cash coming in to pay its bills.” Perhaps the people who need financial acumen the most, but who have the least access to acquiring it, are micro entrepreneurs eking a living out of the world's tiniest businesses in order to survive. Though many microfinancing institutions exist to mete out funds to these tiny businesses and to train their owners about the importance of repaying the funds and using the funds for working capital or productive assets rather than personal consumption, the training may fall short in helping micro business owners to develop the financial acumen needed to lift their businesses – and themselves - out of the crushing cycle of poverty (Datar et al., 2009).

A relatively new tool that has been developed by a team of two former KPMG Chartered Accountants who were mystified by how difficult it has been through the ages to effectively teach people financial acumen – specifically, how to properly use the double-entry system of accounting, and to understand and exploit the valuable information that it provides. The purpose of this paper is to introduce this system of teaching financial acumen, describe its theoretical underpinnings,

and demonstrate the relevance of the system to business people from the largest of companies to the tiniest, in business environments ranging from fully developed markets such as the United States to emerging markets and even to less-developed countries (LDCs).

The name of this new system of teaching financial acumen is *Color Accounting*. The creators of Color Accounting (CA), Mark Robilliard and Peter Frampton, describe CA as “a new way of presenting financial information using coded-color and diagrams. The system’s BaSIS Framework™ is a holistic and graphical view of a balance sheet and income statement - it serves as a graphical accounting interface” (Accounting Comes Alive, n.d.). The BaSIS Framework refers to a combined Balance Sheet/Income Statement diagram (see Figure 1) that serves as a colorful board onto which tiny “buckets” representing financial accounts are placed. The

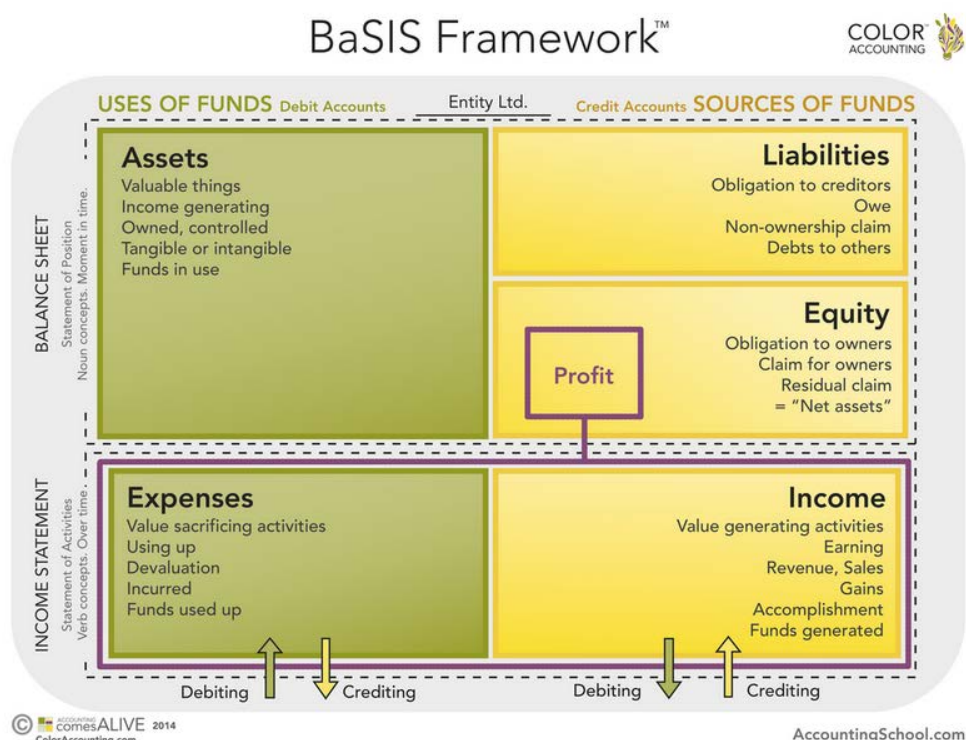


Figure 1. BaSIS Framework. (Source: www.ColorAccounting.com)

account buckets, in turn, hold “tickets” which represent the individual components of double-entry accounting transactions (see Figure 2).

The CA system is so flexible and intuitive that it can be used to teach virtually any accounting concept or system. The author has used it to teach courses ranging from financial accounting principles to intermediate managerial accounting to governmental and not-for-profit fund accounting. The combination of using colors instead of debits/credits or left/right with the



Figure 2. Color Accounting BaSIS Framework with Buckets Holding Tickets (Source: www.coloraccounting.com.sg)

bucket/ticket tactile experience adds unparalleled richness to the process of learning how financial transactions work from a purely mechanical standpoint and visualizing the logic underlying each transaction.

The variety of organizations the world over whose employees have benefitted from the use of CA to help them improve their financial acumen is both impressive and revealing, and includes Fortune 100 companies, governmental agencies, international law firms, megabanks, worldwide nonprofit organizations, and all four of the largest international accounting firms. Though a few universities

are using CA in their accounting curriculum, a constituency which, surprisingly, has largely been excluded from enjoying the benefits of learning financial acumen via CA is the student body at both the high school and college levels. One significant and notable exception is the use of CA in high schools in South Africa, which will subsequently be discussed in greater detail.

New paradigms in the teaching of accounting are sorely needed for many reasons, as was reiterated most recently in the Pathways Commission Report (2012) and re-emphasized from earlier works such as the Accounting Education Change Commission's Position Statement One (1990) and Albrecht and Sack's monograph (2000). Though these reports span decades, their calls to action reverberate recurring themes. Among other directives, each of these reports recommends revamping the methods through which introductory accounting courses are taught; increasing the value added by high school accounting courses; improving the learning process in accounting courses; and positively enhancing the perception of accounting to young people. It can be argued that CA can be beneficial in operationalizing each of these recommendations.

The Color Accounting teaching model begins with the simplest of ideas – going to the grocery store – which can be related to by audiences at any level of education, thereby proceeding from the known to the unknown in the eyes of learners. CA builds the concepts and basic vocabulary of the balance sheet first, advancing the idea of duality with assets as funds in use, and liabilities and equity as the sources of those funds. The colors green and yellow are introduced as deployments or uses of funds (green/assets) and sources of funds (yellow/liabilities and equity). Simple transactions (“tickets” which are cut out and placed on the BaSIS Framework board to represent flows of funds) involving only balance sheet accounts (“buckets” to hold tickets) are the first to be analyzed. Examples of these transactions include funding of the business by owners, borrowing funds, purchasing resources, and repaying debt. Increases in accounts are represented

by using the “same” color ticket as the bucket color (i.e., increasing an asset (green bucket) is done with a green ticket) and decreases in accounts are represented by using the “opposite” color ticket as the bucket color (i.e., decreasing an asset (green bucket) is done with a yellow ticket). The complete avoidance of the terms “debit” and “credit” and the directions “left” and “right” is very liberating to learners. By coupling the use of color with the physical action of placing both buckets and tickets properly, the system effectively advances the understanding of accounting concepts, whether basic or complex, and the need to memorize debit and credit rules is eliminated; however, soon after the color rules are learned (which takes just a few minutes), the debit and credit terminology is introduced. Because the BaSIS framework colors are so easily visualized, it becomes intuitive to learners that debits are green (on the left) and credits are yellow (on the right).

After approximately six pure balance sheet transactions are mastered, the concept of “profit” (purple box inside of yellow equity) is introduced as just another yellow account bucket (retained earnings) on the balance sheet. For example, a cash sale of goods transaction is represented as a green ticket placed into the green cash bucket and a yellow ticket placed into the yellow retained earnings bucket (which sits inside the purple profit box). The corresponding cost of goods sold is represented as a yellow ticket placed into the green inventory bucket and a green ticket placed into the yellow retained earnings bucket. After several of these “profit affecting” transactions are analyzed, the usefulness of grouping all of the various tickets that have accumulated in the retained earnings bucket into separate income statement accounts – green expense account buckets which reduce profits and yellow revenue/income account buckets which increase profits, all of which are then surrounded by a purple line-delineated “income statement” box which appears below the balance sheet and is connected by a purple line to the balance sheet’s purple profit box – becomes self-evident. At this point, a basic analysis of profits can take place and financial acumen blossoms.

Approximately thirteen basic accounting transactions are completed during the CA training. These transactions encompass every possible type of accounting transaction, including accrual and deferral transactions and transactions requiring contra accounts. Conventional financial statement report formats complete with colored outlines relating them back to the BaSIS Framework are then introduced, along with ratio/horizontal/vertical analyses. Any accounting concept, issue, or problem at any level of complexity can now be analyzed. This entire learning process is fun, and revealing, and takes just a few hours to complete. The resulting improvement in financial acumen, as related by learner/participants to CA trainers, is remarkable.

A significant part of the explanation as to why the improvement in financial acumen is impacted to such an extent by the CA teaching model is likely associated with the instructional benefits that accrue through the infusion of color into the learning process. A variety of studies support the idea that color impacts memory, and that the use of color to influence memory in a learning environment may have practical implications (Kumi, 2010). Myers (2004) states that color influences how humans see and process information, and can improve the ability to remember both words and pictures. Given that CA's creators refer to the system as a "graphical accounting interface", it is interesting that research in the area of graphical information presentation suggests that color decreases search times and helps with the identification and organization of information, and that color can be used in encoding strategies to enhance memory and recall (Benjamin, 2007; Benbasat and Dexter 1986).

In addition to supporting research in the area of color and memory, the results experienced using the tactile, hands-on CA teaching model also illustrate the wisdom of the old Chinese proverb: "Tell me, and I will forget; Show me, and I may remember; Involve me, and I will understand". Active, high-impact learning permeates the CA teaching model, implying that the CA teaching

model can be an effective tool to support the implementation of the recommendations proffered by the previously-mentioned Pathways Commission and other accounting education reports. Such experiential learning activities – particularly those that enhance students’ ability to integrate disparate but related concepts – are fundamental to effective business education (Colby, Ehrlich, Sullivan, and Dolle, 2011). Completing the entire CA training regimen, including applying CA to internal business problems being encountered by the learner/participants’ organizations, fosters higher-level learning as set forth in Bloom’s taxonomy of educational achievement, which contains the following six levels of increasing cognition and learning (Bloom et al., 1956):

- Knowledge – remembering previously learned materials
- Comprehension – understanding manifested by translation, interpretation, and extrapolation
- Application – applying knowledge to new situations
- Analysis – parsing and organizing information to make inferences and generalizations
- Synthesis – compiling information in a different way to produce new materials
- Evaluation – presenting and defending judgments in terms of internal evidence and/or external criteria.

The benefits of using the CA model to enhance financial acumen extend far beyond the classrooms and training rooms of organizations in developed nations. Evidence suggests that the knowledge, skills, and abilities fostered by increasing the financial acumen of people in emerging or LDC economies may mean the difference between living comfortably and living in poverty or starving, as revealed in the following story (Bodden, n.d.):

Colour Accounting’s impact has often been life changing. “People have major epiphanies,” Frampton says. Ten years ago in post-apartheid South Africa he held a workshop that ran one night

a week for four weeks. On the third night a student came in and said he couldn't sleep the previous night because he was so excited. "I said: 'Why? It's just accounting.'" The student said that he had failed four accounting courses and now he knew he wasn't stupid. Then Frampton realised that for this student, accounting was a passport to middle-class life, rather than a life in a shanty.

In order to improve operating results of micro enterprises in poverty-stricken conditions, it is not enough to simply provide their owners with operating capital; teaching the owners financial acumen to understand how best to deploy the money and track its progress toward growth and profitability is just as important, if not more so. According to Global Partnerships, a non-profit impact investor seeking to expand opportunity for people living in poverty in Central America and the Caribbean, it is estimated that 115 million microfinance clients lack training in basic financial acumen and that many of these clients are also microentrepreneurs who make their livings and feed their families with the income generated from their tiny businesses. Without financial training, the benefits to be gained from microfinance loans cannot be maximized; but with financial training, microentrepreneurs are better equipped to build successful businesses that can grow to provide additional money for their children's education, household improvements, or business expansion with a corresponding increase in local job opportunities (Global Partnerships, 2014).

Studies have been conducted in order to measure the impact of providing financial training to impoverished microentrepreneurs, with mixed results. Karlan and Valdivia (2006) found that financial training provided to impoverished female entrepreneurs in Peru led to better business practices and increased revenues and profits, with participants reporting engagement in segregation of household and business assets, reinvestment of profits, maintenance of accounting records, and consideration of new markets and profit opportunities. Using more extensive, more hands-on training than Karlan and Valdivia, Gine and Mansuri (2011) found that offering business training to microfinance clients in rural Pakistan leads to increased business knowledge, better

business practices (but not business sales), and increases in household expenditures, group cohesion, and general outlook on life, primarily among male participants. Similar results were observed in De Mel et al. (2012) in Sri Lanka, Martinez A. et al. (2013) in Chile, and, most notably, Drexler et al. (2010) in the Dominican Republic. Drexler et al. developed two distinct types of financial accounting training to test whether outcomes differ when standard small business training utilizing traditional financial accounting teaching methods is used compared to when a simpler view of financial decision making using easily implemented decision rules without explaining the underlying accounting motivation is used. The objective of the Drexler study was to quantify the effectiveness of training when a trade-off between the complexity of material taught versus the depth of the concepts taught exists. Drexler et al. found that those people offered the simpler training were more likely to implement the training by keeping accounting records, calculating monthly revenues, and separating business and home recordkeeping, with the more significant changes in business outcomes being observed in the group that received the simpler training. The implication of the Drexler study to organizations which provide financial acumen training to impoverished microentrepreneur clients but report only mixed success with those clients' implementing the training is to use simpler accounting training methods. Color Accounting becomes a serious contender for use as a "simple accounting training method" in the training of microentrepreneurs since it is easy, intuitive, and fun while at the same time introducing more analytically sound tools to maximize the utilization of financial information.

The evidence to support the ease of learning accounting and using the information provided by the double-entry accounting system with CA is particularly compelling in the case of CA's introduction into public and private high schools in South Africa. According to Peter Frampton, the first South African high-school students to be taught accounting using CA consisted of a small

sample in 2011, all of whom passed accounting that year. Subsequently, forty South African high school accounting teachers evaluated CA, with highly enthusiastic reactions. In November, 2013, Frampton trained forty high school teachers, some of whom were among the previously-mentioned forty. The three thousand students of these teachers will be the first large group of high-school students to be exposed to CA as an augmentation to the traditional accounting teaching approach and curriculum. Data is being collected for assessment after these students finish their final exams late in 2014. Thereafter, Frampton expects the user population to grow to tens of thousands with a rapid scale-up of CA in other public and private South African high schools, as indicated by interest expressed by these schools, including the top private school in South Africa. Figure 3 is a late-2013 photo showing students of a teacher on the opposite side of South Africa who heard about the CA pilot project in the Western Cape Province, and wrote to Frampton begging for access to the CA materials. Frampton believes this to be an indication of the sort of response to CA that will be experienced when the CA education initiative becomes more widely known.



Figure 3. South African 10th graders, BaSIS Framework board, buckets, and tickets. Source: Peter Frampton

One example of the many unsolicited letters received by Frampton from South African high-school students follows:

13 May 2011

Dear Mr. Frampton

I thank you very much for giving myself and my friends an opportunity to be able to be part of colour accounting. It has been an amazing experience. It made Accounting lessons more exciting. I felt more comfortable with the transactions and the “butterfly” [BaSIS Framework]. As a result I’ve passed my recent test with better marks than before.

My favourite part was when we had to do transactions and place the tickets into the baskets. It made much easier for me. I very much appreciate the opportunity. Keep on doing what you are doing because it works well.

God bless you as well as your family.

Your Faithful,

Nonseba Socha

Though the results of formal research into the effectiveness of CA as a tool to teach accounting are in progress but not yet available, it is clear that CA has become a popular and valuable asset to accounting students and users worldwide.

Implications for Future Research

Color Accounting is a teaching method that has proven itself as a viable method to facilitate the teaching and learning of financial acumen and double-entry bookkeeping. A variety of possibilities exist for future research into the various learning and entrepreneurial areas where Color Accounting can be anticipated to have a measurable impact.

Although people in developed countries are accustomed to hearing about the benefits of entrepreneurship, by far the bulk of microentrepreneurs exist in emerging markets and LDCs. According to Chandy and Narasimhan (n.d.), due to the sheer number of microentrepreneurs in these economies, the promise inherent in microentrepreneurship, and the relative lack of systemic research about microentrepreneurs, it is in the best interest of those in developed economies to gain a better understanding of microentrepreneurs in order to better their lot in society, which will help everyone, much like a rising tide lifts all boats.

Additional research to further understand just why Color Accounting works so well could take a variety of forms, from the analysis of the effects of color and/or tactile cognition on the learning process, to quantifying the improvement in learning that is experienced through using Color Accounting in a classroom setting compared to traditional methods of teaching accounting.

Whichever way the further exploration of Color Accounting goes, the results should be exciting and hopefully will earn this valued learning method its proper place in the best teaching practices in accounting education.

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**IMPACT OF LEADERSHIP STYLE ON CULTURE OF INNOVATION: A STUDY OF
RETIRED MILITARY SENIOR OFFICERS IN EXECUTIVE-LEVEL
SUPERVISORY ROLES WITHIN THE HIGH-TECHNOLOGY ENGINEERING
DEFENSE INDUSTRY**

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for Global Leadership Conference
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Jose Collazo

Note: This article is based on the author's dissertation conducted under the guidance of Pepperdine University, Graduate School of Education and Psychology. Readers are invited to view that source if interested in an extensive review of the prior literature relevant to this topic, as well as a more comprehensive and detailed report of the study.

Abstract

This study examined the relationship between leadership style and past military rank, and how these might impact an organization's culture in ways that promote or inhibit innovation climate. Leaders with military background were hypothesized to operate in a more transactional style, characteristic of hierarchical organizations. Multifactor Leadership Questionnaire subscales were independent variables and the Workplace Innovation Scale's innovation climate subscale was a dependent variable. Supervisors reported on their own leadership style and subordinates reported on their supervisor's leadership style. The leaders had a predominant transformational leadership style that was, subordinate ratings of idealized influence matched supervisor self-ratings, and both samples considered innovation climate to be enhanced by both styles, though subordinates rated the innovation climate as lower than did supervisors.

Background

High-technology defense contracting firms commonly hire high-ranking U.S. Army retirees. According to T. DiRienzo (personal communication, March 30, 2013), many retired army officers have a significant amount of institutional knowledge regarding critical national security defense systems. They also have established relationships with the key program personnel associated with these systems. The intent in hiring a retired senior army officer who has spent his or her final years in military service, as a key player in a significant defense program, is to better position the defense contractor to leverage the officer's program familiarity, institutional knowledge, and relationship network to gain a competitive advantage (T. DiRienzo, personal communication, March 30, 2013). As a result, high-ranking senior military officers are particularly attractive as potential executive-level hires after they retire from military service (Clark, 2011). The emphasis in military training has typically been authoritarian leadership, which typically has a transactional incentive structure, such as pay and promotion based on exact adherence to command (Rudnick, 2007, para. 7). This structure is characteristic of hierarchical organizations where functionality benefits from conformity and lack of dissent as fundamental elements that enhance a high level of coordination.

Problem and Purpose

According to Ulmer (1998), the commonly accepted authoritative leadership style used on the battlefield receives broad support as widely applicable and the most appropriate leadership style for military operations, and some of the military leadership style transfers to subsequent civilian work, as was found in a case study of two retired leaders in the field of education (Riegling, 2008). This supposedly transactional leadership style may influence the culture of an organization in ways that degrade the capacity for innovation, and thus the

organization's competitive posture. Thus the benefits of transformational leadership are becoming a more frequent topic of discussion within the military (Grothe, 2009; Rickard, 2013; Roseman, 2014; Rudnick, 2007).

The purpose of this quantitative study was to examine (a) the relationship between the leadership characteristics of retired senior army officers functioning in executive-level supervisor roles within the high-technology engineering defense industry and (b) the characteristics required to optimize innovation climate. The present study used the definition of innovative climate provided by Charbonnier-Voirin, El Akremi, and Vandenberghe (2010), in that an organization provides followers an environment in which they are encouraged to independently develop ideas and collaborate with team members to synthesize multiple perspectives for larger collective creativity, a place where employees are exposed to "norms and practices that encourage flexibility and the expression of ideas and learning" (p. 701).

Scope of the Study

This study was not intended to address the role of leadership practices in the implementation phases that move innovation beyond concept and into tangible products or deliverable services. This study was restricted to the investigation of leadership practices that influence idea generation, what Somech and Drach-Zahavy (2013) call the "creativity phase" (p. 686), the part of innovation that generates new products and services. This study examined only innovation climate, not other known distinct components of innovation such as organizational innovation, individual innovation, and team innovation (McMurray, Islam, Sarros, & Pirola-Merlo, 2013).

Literature Review

As an introduction to key concepts in this study, organizational *climate* is a narrower construct than organizational *culture*. Citing past researchers, Ruppel and Harrington (2000) stated that climate refers specifically to the shared perceptions of the events, practices, procedures, and kinds of behaviors that are rewarded, supported, and expected. Sarros et al. (2008) defined *organizational innovation* as referring to the “introduction of any new product, process, or system into an organization” (p. 146).

There is a relationship shown in the literature between leadership characteristics and organizational innovation (Allameh, Babaei, Chitsaz, & Gharibpoor, 2012; Hoch, 2013; Jung & Sosik, 2006; Sarros, Cooper, & Santora, 2008). Somech (2006) focused on leadership style as a key factor that has an intervening impact on *team* innovation. Researchers viewed innovation as an outcome of many variables, but concluded that the predominant influential factors are leadership and organizational culture (Choi, Anderson, & Veillette, 2009; George & Zhou, 2001; Sarros et al., 2008; Taggar, 2001). Although many studies have directly correlated transformational leadership style with innovation outcomes (Apekey, McSorley, Tilling, & Siriwardena, 2011; Damanpour & Schneider, 2009; Gandz & Bird, 1996; Isaksen & Akkermans, 2011; Lin & McDonough, 2010; Pertl & Smith, 2010), only a few have found transformational leadership style to correlate specifically with factors that define an *innovation climate*, such as greater efficacy beliefs and creativity (Archibald, 2015; Charbonnier-Voirin, El Akremi, & Vandenberghe, 2010).

Cowan-Sahadath (2010) notes that in more hierarchical organizations, information is less often shared widely, but is seen as owned and dispensed by upper management. This can inhibit quick access to information and thus inhibit innovation. Baucus, Norton, Baucus, and Human

(2008) indicated that a leader's rigidity and emphasis on hierarchical structure is less likely to promote innovation.

Methods

Research Design and Rationale

This study intended to reveal the dominant leadership styles of a sample of retired army senior officers (between transactional or transformational) through the Multifactor Leadership Questionnaire (MLQ). The self-report survey dataset was collected from both the supervisors and from subordinates. The study used a quantitative research method and a descriptive correlation design. The independent variable is the supervisors' predominant leadership style, as indicated by scores on the MLQ. The dependent variable was innovation climate, as measured by the innovation climate subscale of the Workplace Innovation Scale (WIS). Use of bivariate correlations was used, because variables were compared in pairs. The variables were tested to reveal either positive or negative relationships and included a predictor variable characteristic of transactional leadership (contingent reward behaviors) and predictor variables that are characteristics of transformational leadership (idealized influence behaviors, idealized influence attributes, individualized consideration, intellectual stimulation, and inspirational motivation) and the outcome variable innovation climate, which represents the presence of a work environment that encourages or facilitates innovation.

Sample

Inclusion criteria for the supervisor group were as follows: (a) served in the U.S. Army for a minimum number of 20 years, (b) retired at the rank of lieutenant colonel or higher, and (c) current full time employment in a high-technology engineering defense contracting firm, having held an executive-level supervisor position for at least 6 months as a program manager, director,

vice president, president, or CEO. Inclusion criteria for the subordinate group consisted of employees having worked for at least 6 months under a supervisor qualifying with the above inclusion criteria.

For the subordinate group, even though many of the subordinate employees may work on a variety of teams and projects, and therefore may report to more than one supervisor, any employee who reports to a qualifying supervisor was considered a subordinate for the purpose of this study. The supervisors were not linked in the surveys with the supervised employees, giving the supervised employees the assurance that even their collective responses would not be known by their supervisor. This was intended to give them an added level of collective anonymity, allowing the researcher to assume that responses would be more valid, not subject to any bias reflecting a desire to avoid supervisor disapproval or incur supervisor approval.

Instrumentation

Three sets of questions were presented to respondents: demographic questions that served as inclusion criteria and for identifying which group respondents were in (supervisor or subordinate); the MLQ short form; and innovation climate questions, a subscale of the Workplace Innovation Scale (WIS). Reliability scores for the MLQ (Avolio & Bass, 2004, p. 119) shows that subscales ranged from moderate to good (Antonakis, 2001). It has been well used in leadership studies, including study of military leadership (Lorell, Lowell, Moore, Greenfield, & Vlachosv, 2002). The WIS has demonstrated reliability over the past 9 years (McMurray et al., 2013). The innovation climate subscale had excellent validity shown by Cronbach's alpha ($\alpha = 0.63$).

Results

Reliability

In the present study, the Cronbach's alphas for the innovation climate subscale of the WIS were .80 and .85 for the supervisor and subordinate groups, respectively. *The MLQ Manual and Sample Set* confirmed that use of the set of two subscales (transformational and transactional) was acceptable (Avolio & Bass, 2004, p. 119). The overall pattern of reliability scores among MLQ factor scores (subscales) in the present study resembles those in the MLQ manual for the 2004 normative sample based on U.S. data (Avolio & Bass, 2004, p. 73). Both were at the $p < .05$ level. An alpha level of .05 was used for all tests of statistical significance.

Findings

The main findings were as follows:

- The mean scores of the military-background executive-level supervisors indicate their predominant leadership style is seen as transformational, as rated by themselves and as rated by subordinates of these executive-level supervisors.
- Both MLQ scales for the subordinate-reported leadership styles were positively correlated with innovation climate at a statistically significant level.
- Subordinates interpret their organization's innovation climate to be at a lower level than their executive-level supervisors' interpret it to be.
- The subordinate ratings of the executive-level supervisors' idealized influence subscale, as compared to subordinates' ratings on all other subscales, was as high as the executive-supervisors' self-reports, but subordinate ratings of other transformational-indicating subscales were not as high as the supervisor self-reports.

Conclusions and Recommendations

Baucus et al. (2008) indicated that a leader's rigidity and emphasis on hierarchical structure transfers to rigidity to the innovation process, which initially led the researcher to question whether military leadership might inhibit innovation climate. In contrast, correlations between leadership styles and innovation climate seemed to refute the notion that decades of leadership in a military setting predisposes the military retiree to predominantly function as a transactional leader in other, post-military settings. The study indicates that the leadership qualities of these executive supervisors include the transformational leadership qualities that foster an innovation climate (as described by Gumusluoglu & Ilsev, 2009; Rosing, Frese, & Bausch, 2011; Somech & Drach-Zahavy, 2013).

Executive supervisors were rated as primarily transformational, but ratings also indicated some transactional qualities. This seems to indicate that retired U.S. Army leaders serving as executives in the high-technology defense sector are capable of situational leadership, utilizing one or both styles depending on the current need (Northouse, 2001), and/or ambidextrous leadership. Ambidextrous leadership refers to a leader's ability to foster both explorative (innovative and creative) and exploitative behaviors in followers by increasing or reducing variance in their behavior and flexibly switching between those behaviors (Rosing et al., 2011) depending on which is more useful for the current phase of project. These leaders believe that they tend to apply the practices related to transformational leadership (i.e., encouragement and inspiration) before they focus their attention on the mistakes or policy deviations of their subordinates.

One interpretation of the findings is that the subordinates believe that both leadership styles have a role in fostering an innovation climate, because both (a) the transactional leadership

qualities showed a significant positive correlation with innovation climate, instead of just being non-significant (i.e., neutral). This finding does not support prior studies in which transactional leadership style was reported to have a counterproductive impact on aspects of innovation climate, such as knowledge conversion (Allameh et al., 2012), perceived social support, self-efficacy beliefs, emotions, and threat appraisals (Lyons & Schneider, 2009). Instead, this study's findings somewhat support the findings of Jung and Sosik (2006), as described in the literature review, suggesting that under varying conditions, some subordinates generated more ideas (i.e., a measure of innovation) under a transformational leader, while other subordinates generated more ideas under a transactional leader. In other words, there was an interaction among type of leader, type of subordinate, and type of situation, with differing outcomes for each combination. Moreover, the positive correlation between leadership style and innovation climate may indicate that the use of these leaders' transactional qualities, when assessing the application of these qualities in the context (i.e., utilizing situational and/or ambidextrous leadership), seems to indicate an ability to choose the transactional and transformational qualities that enhance innovation climate, depending on the situation.

Findings seem to indicate that executive-level supervisors conceptually understand the leadership nuances required to optimize innovation climate and perhaps believe they are applying what is necessary to provide a practical, positive impact, while subordinates interpret the executive-level supervisors' impact on innovation climate to be at a lower level than their leaders believe it is. This may indicate that that supervisors see their leadership roles as more prominent, important, and impactful than the subordinates believe they are, even though subordinates agree with supervisors' evaluation of their leadership in terms of distribution of transformational and transactional characteristics.

The high ratings that subordinates gave their supervisors for the idealized influence subscale indicates that the subordinates hold these leaders in high regard, which has added validity when considering the complete anonymity provided by the present study's procedures. These leaders are seen as holding the group's interests above their own self-interest, behaving in ways that generate respect, and considering the moral and ethical implications of decisions (Avolio & Bass, 2004).

Recommendations for Practical Application

Recently studies of followers have investigated the impact of followership characteristics on leadership and the co-creation of influence (Uhl-Bien, Riggio, Lowe, & Carsten, 2014). According to Uhl-Bien et al. (2014), it is in the leader and follower relationship that the leader delivers an organizational impact through the engaged contributions of their followers. A review of the principles of leadership as impacting innovation climate may prove beneficial for executive supervisors, helping leaders and followers to work within a common paradigm to foster the continual development of the leader and follower relationship. In Hoch's (2013) investigation of innovative practices, these practices are positively associated with shared leadership (Kouzes & Posner, 2008), where the way ahead is determined by the depth of engagement and collective intelligence of the team. The application of these concepts may broaden the idea sources and expand the scope of choices for product and service differentiation. The benefits of applied transformational leadership include aligning individual contributors into a higher-level collective impact, where the impact of a set of synergized contributors is greater than the sum of the individual contributors involved. It may be useful for organizations to communicate their expectations to executive-level supervisors that the leaders' ideal role is to

offer support and provide a climate of innovation, in ways fostered by transformational leadership, not to keep subordinates in line and on task, as a more transactional role.

Ambidextrous and situational leadership styles. The findings seem to indicate that retired U.S. Army leaders serving as executives in the high-technology defense sector are capable of situational leadership (Northouse, 2001) and/or ambidextrous leadership (Rosing et al., 2011), having the capacity to apply either a transformational or transactional leadership style, or a combination of the two, depending on what the leadership situation demands. Ambidextrous leadership is a recently formulated conceptualization that is somewhat similar to but differs from situational leadership. Ambidextrous leadership is defined as a leader's ability to foster both explorative (innovative and creative) and exploitative behaviors (positioning talents and incentives where needed) in followers by increasing or reducing variance in their behavior and flexibly switching between those behaviors (Rosing et al., 2011). Bryant (2003) divided knowledge management into three categories: creating, sharing, and exploiting knowledge. Transformational leadership is credited to effectively create and share knowledge, while transactional leadership is attributed to exploit knowledge, both of which contribute to effective team performance. Training and communication on situational applications of leadership styles might benefit their organizations, so both leaders and followers develop a common understanding of how situations, associated urgency factors, and windows of opportunity determine the ideal leadership style. With an understanding of affecting factors, both leader and follower can flexibly adapt to the mode that maximizes the fulfillment of organization interests.

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013 SOCIALLY CONSCIOUS LEADERSHIP SELF-REFLECTION AND SOCIAL AWARENESS

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Leadership is a quality admired across all professions, and is desired and pursued by innumerable people from divergent backgrounds. One aspect of leadership that can hinder potential great leaders is the person's own ability, or lack thereof, concerning their facility to be socially aware by utilizing culturally and socially responsive critical pedagogy. Paulo Freire (1993; 2005) and bell hooks (1994) both speak of the transformational power of radical love in their publications. In Freire's (1993) groundbreaking novel, *Pedagogy of the Oppressed*, he eloquently elucidates for readers the very definition of radical love, and how radical love can liberate common shortcomings amongst teachers. In *Teaching to Transgress*, hooks (1994) espouses the power of radical love; incidentally, when people take time to reflect upon others' perspectives, they can use that knowledge to help inform and motivate their peers. This type of self-reflection can lead to deeper levels of trust within the group, and promote a copasetic environment in which all members of the group can relate to each other and work together in the most effective manner possible.

In 2010, Daniel Shapiro unearthed relational identity theory, forever changing how we view interactions between and among groups. Shapiro brilliantly imparts this new theory, and the benefits of its understanding and comprehension, via a group activity. Performing a similar

activity that relates to a group's own interests in personal growth and development would help the group develop their culturally and socially responsive successive critical pedagogies. The participation in the aforementioned activity would aide participants' social consciousness concerning leadership on a conceptual and interpersonal scale.

After participating in the activity, participants should viscerally feel their own communication and social skills shifting to a new, more informed place. One way in which learning takes place is through the process of being uncomfortable, or by participating in a new and different situation then experienced prior to that experience. The activity will help participants discover the potential wealth of knowledge that can come from learning to accept and understand this opportunity for personal growth. The goal is to help adults understand the importance of how adult learning can take place in order to aide their organizations social consciousness via culturally and socially responsive critical pedagogy and, of course, communication in order to meet the goals that they set.

The activity will be very similar to the activity that Daniel Shapiro documents in his 2010 article, *Relational Identity Theory: A Systematic Approach for Transforming The Emotional Dimension of Conflict*. In the aforementioned article, Shapiro has the group divide itself into several groups to complete the activity. So, for this activity after everyone has arrived each person will receive a colored object that they will use to divide themselves into groups. The aim is to have a minimum of four groups. Next, the groups will emulate Shapiro's 2010 format for playing the game of "Tribes," by participating in defining:

The key qualities of their tribe by answering questions such as, does your tribe believe in capital punishment? And, does your tribe believe in abortion? Each tribe (is) required to

come to agreement on these qualities through consensus, not voting, and to subscribe only to beliefs with which they could live. (2010, p. 634)

This activity will be facilitated, not dictated, and requires that all members of the group participate in order to come to a consensus in their given groups. The groups will have a bit of time to decide on the consensus answers for their tribes, and once they do the lights will go out (if possible) and an alien creature will enter the room. Again, following Shapiro's model, the alien will say:

I am a creature from outer space. I have come to destroy Earth. I will give you one opportunity to save the world from utter destruction. You must choose one tribe as *the tribe* for everyone. You must all take on the attributes of that tribe. You cannot change or bargain over any attributes. If you cannot come to full agreement by the end of three rounds of negotiation . . . the world will be *destroyed*! (2010, p. 634)

The rounds mentioned by the alien will each be five minutes in length.

It is highly unlikely that the groups will be able to come to an agreement as to which tribe should represent "the tribe" for everyone. However, if we are able to come to an agreement we will discuss how this happenstance occurred. If we are unable to come to an agreement, we will again discuss how this happenstance occurred. At the end of the third round if an agreement is not met the world will explode.

Given that Shapiro has tried "this exercise nearly 100 times with a great variety of participants: graduate students of law, business, psychology, and politics; government and business leaders; and key negotiators for conflicts in the former Yugoslavia and the Middle East"

(2010, p. 635). And that, “the world has exploded all but a handful of times” (2010, p. 635). We can conclude that, “this tribal dynamic appears so engrossing, and identities rigidify so rapidly, that participants quickly lose sight of their superordinate goal to save the world for the sake of exclusive tribal identities crafted” (p. 635). We will discuss this and why it was that the groups were either able, or unable to come to a consensus, and if they think that they all utilized their emotions in a constructive manner. We will also allow ample time for reflection housed within the construct of the power of radical love.

Shapiro expounded on some of the revelations that participants espoused, “My parents and I were nearly victim to the Holocaust. I vowed ‘never again.’ But here I am, responding to the constraints of this exercise, without as much as a word of protest until it’s too late.” An academic said, “I set out to either show unifying leadership or to become a demagogue, breaking the rules of the game. But I failed to do either, and let down history and humanity” (2010, p. 635). The group collectively will probe for this type of self-reflection and social awareness. By authentically examining and comprehending the group’s emotionally led actions, that either allowed or did not allow a consensus, we will be able to understand on a deeper level just exactly what role our emotions, as well as radical love, play in how we conduct ourselves within our own organizations. Members will be prompted to volunteer an issue that they are struggling with within their organization so that they may examine with the group whether or not their emotions are hijacking their best efforts in resolving the issue.

It is vital to note the paramount importance that should be dedicated to the allotted time for the groups so that they may come to a consensus. Unfortunately, if they are not able to come to a consensus the activity will not be able to be completed in a manner so that the participants will be able to comprehend the magnitude of the role that their own emotions are playing in their

decision making processes. For example, as Shapiro noted that a participant stated upon completion of the activity, “A deputy head of state summed up the emergent theme of the group’s experience: We live in a tribal world. If we cannot deal with emotions constructively, we are doomed” (2010, p. 635). Using that quote as a springboard we will delve into what that statement’s underpinnings and ethics may imply. The hope is that one of the participants will make a statement similar to this quote that we may examine. However, if a statement like this is not provided by one of the participants in the activity, we will utilize this quote, and the potential it will provide as a tool to pry open our own emotionally driven behaviors exhibited during the activity.

Shapiro dissected, “ideas to improve the way groups deal with the emotional dimensions of real-world conflict” (2010, p. 635). Likewise, we will inspect these emotive measurements of real-world disagreement that were exhibited during the activity. Additionally, we will examine, “meaningful patterns of constructive conflict management (that) can be distilled” (2010, p. 635). We will scrutinize, “practical approaches to improve the way people deal with intergroup conflict,” and relates these findings to the scaffolding radical love provides as a framework for our emotions (2010, p. 635). Conflicts that emerge will be appreciated and shared in a safe environment provided by the group setting. Shapiro found four main obstructions to conflict management:

- (a) the rational actor model, (b) policymakers lack a robust social unit to identify the emotional lines of loyalty in intergroup conflict, (c) as the Tribes exercise makes clear policymakers lack theory to help them appreciate what compels group members to move from loose affiliation to tribal attachment becoming willing to sacrifice heavily for their

tribes, and (d) policymakers lack strategies and tactics to manage the emotional dynamics of intergroup conflict. (2010, pp. 635-636)

To really bring home the fourth dimension of the main obstructions to conflict management, it is pertinent that the facilitator ask the groups at the end of the activity how many participants thought that another participant acted irrationally. This important civil discussion will additionally help participants unpack their own behaviors that may be emotionally led, or even irrational in nature. Participants will be encouraged to ruminate on how the power of radical love may play a future role in these behaviors.

A thorough discussion of Shapiro's "psychological concept, the *tribes effect*, which is the tendency for a tribe's relational identity to become rigid, increasing the likelihood that intergroup relations will become polarized and will trend toward violent conflict" will further help the group examine their own beliefs (2010, p. 636). Deliberating and debating the theory and conceptualization of "*relational identity*—its perception of its association with another individual or group" with the group will cement this understanding (p. 636). Shapiro explained, via Buber (1970), Cooley (1902), Harre, ' Moghaddam, Cairnie, Rothbart, and Sabat (2009), that, "we constantly position ourselves in relation to others and define ourselves according to these perceived relations" (p. 636). In order to facilitate the participants' comprehension of Shapiro's Relational Identity Theory, RIT, we will discuss how he defines the term; namely, "Relational identity theory (RIT) provides a systematic approach to understanding emotional and identity-based dimensions of conflict" (p. 636).

Additionally, we will consider how Shapiro examines two aspects of RIT, affiliation and autonomy via a previous publication, which emphasizes "the power of relational identity

concerns” (2005, p.77). Shapiro explains that, “affiliation refers to the degree and valence of each party’s emotional connection *with the other*, whether close or distant, included or excluded, positive or negative” (2005, p. 78). Autonomy, according to Shapiro, “refers to the degree and valence of each party’s freedom *from the other*—their independence to think, feel, or do as they would like without being constrained by the other” (2005, p. 78). Comprehending how these two aspects of RIT are interpreted will provide the group with a framework of understanding for the theory’s organization.

Next, we will explore how RIT delves into the underpinnings of emotions and examines, “the impact of frustrated *relational* identity concerns on conflict escalation” (Shapiro, 2010, p. 636). In other words, we will examine how RIT hones in on “psychological relations between individuals or groups,” rather than on the “independent psychology of groups in conflict” (p. 636). Shapiro deduced that human needs, like self-enhancement and self-esteem, “serve to enhance the self, often through interpersonal or intergroup validation” (p. 636). This vital aspect will permit the group to delve into the divergence in the juxtaposing relationship Shapiro finds between autonomy and affiliation, which, he explains, “serve to enhance the relationship” (p. 636). Shapiro concludes that, “these relational identity concerns are the direct property of the relationship between parties and thus are core concepts of RIT” (p. 636). Therefore, a thorough comprehension of RIT is the goal of the activity and following conversation and discussion.

It is also imperative to discuss Shapiro’s definition of tribes, “a *tribe* (is) any group whose members see themselves as (a) *like-kindred*, (b) *kinlike* in their relational connection, and (c) *emotionally invested* in their group’s enhancement. All three elements are necessary for a group to be considered a tribe” (2010, p. 638). We will converse about this experience within the tribes that were utilized for the activity, as well as how the tribes viewed their autonomy and

affiliation through the scope of what was perceived and what was desired for the group. We will discuss what Shapiro calls the tribes effect, and he defines as, “*tribes effect*, which refers to the rigidification of a tribe’s relational identity vis-a`-vis another group” (p. 639). Shapiro further explains the tribes effect as a, “severe threat to autonomy and affiliation (that) can turn a tribe from a loose association into a tightly defined unit whose members are willing to defend their tribe’s physical and psychological existence at substantial personal cost” (p. 639). The group will analyze why, or how the tribes effect did or did not occur during the activity. Special emphasis will be placed on the group’s analysis of their small groups’ unassigned leaders in regard to whether or not the tribes effect was observed. Shapiro noted that, “elected or self-designated leaders in the tribe create or amplify the threat, calling attention to unaddressed relational identity concerns and their critical emotional significance for the tribe” (p. 639). It is vital to explore this extreme polarization that may be experienced within the groups’ participation in the activity, and exhibited by the small group leaders.

In conclusion, as a group we will discuss Shapiro’s (2010) finding and summary of what he foists as the underpinnings of RIT:

Destructive conflict is likely when a group perceives that their relational identity concerns for affiliation and autonomy are left unaddressed. The emotional complexities of intergroup conflict are best understood through the lens of *tribes*, a broad term describing groups whose members are connected through kind, kin, and emotional investment. When a tribe’s relational identity concerns are undermined, the resulting negative emotions may stimulate what I term the *tribes effect*. This dynamic rigidifies the tribe’s relational identity, increasing the likelihood of intergroup polarization and conflict escalation. (p. 643)

By examining how conflicts arise, and the emotions that can lead to these conflicts, participants will discover new methods for communication within their organizations where they may be encountering troubles. Viewed through the lens of radical love, espoused by hooks (1994) and Freire (1993; 2005), participants will have a new cache for eradicating problems within their organization, and perhaps even their personal relationships and own emotional intelligence.

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CULTURAL INTELLIGENCE AND GLOBAL LEADERSHIP

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Abstract

Cultural Intelligence (CQ) and its cognitive/behavior skill sets have much to offer global leaders in their pursuit of reducing the ambiguity associated with working across cultures in various parts of the world. It is in the interaction with diverse people where confusion abounds, commencing with ignorance of social customs, communication styles, literal and figurative language, conflict resolution approaches, power distance, and social expectations for business. The Four-Factor Model of Cultural Intelligence is examined in its relationship to Kolb's Experiential Learning Theory and Hope Theory. Immersion experiences are presented as an avenue of enhancing CQ, and practical steps supply guidance for moving from experience to experiential learning.

Keywords: global leadership, cultural intelligence, experiential learning, cultural immersion

As businesses become more global, leaders will be required to readily adapt to change and effectively navigate the complexity of interpersonal relationships. This will help them flourish in an ambiguous environment characterized by cultural differences in values, beliefs, attitudes, and behaviors (Tuleja, 2014). One contributing factor to successful global leadership is cultural intelligence (Ang & Van Dyne, 2008), the ability to function effectively in culturally diverse settings. Earley and Ang (2003) proposed a multidimensional theory of Cultural Intelligence (CQ) based on the work of Sternberg and Detterman (1986). They identified three necessary elements for effective cross-cultural interaction: cognitive, motivational, and behavioral. Ang and Van Dyne (2008) built on Earley and Ang's model to develop the Four-Factor Model of Cultural Intelligence: Metacognitive CQ, Cognitive CQ, Motivational CQ, and Behavior CQ.

The Four-Factor Model of Cultural Intelligence will be examined in its relationship to Kolb's Experiential Learning Theory (Kolb, 2015) and Hope Theory (Snyder, Lopez, & Pedrotti, 2011). The power of reflection in Kolb's model and in CQ offers excellent insight for understanding and increasing one's CQ. Moreover, Hope Theory, with its emphasis on Agency and Pathways thinking, presents a cognitive schema for enriching a global leader's CQ.

Immersion experiences and their potential for enhancing CQ will be discussed, along with the author's reflections of a six week language immersion experience in Lima Peru. Finally, practical steps for building one's CQ will be proposed, based on theoretical and experiential knowledge.

Cultural Intelligence

Ang and Van Dyne's (2008) Four-Factor Model of Cultural Intelligence (CQ) includes Metacognitive CQ, Cognitive CQ, Motivational CQ, and Behavioral CQ. This model takes into consideration how experience and reflection influences CQ. Metacognitive skills require meaningful reflection of assumptions and adopting new guidelines for social interaction, while Cognitive skills refer to knowledge acquisition. CQ motivation describes how much a person wants to learn about another culture, and CQ behavior encompasses the ability to effectively interact with other cultures.

Metacognitive CQ

Metacognitive CQ refers to the conscious awareness of cultural assumptions, the ability to reflect on cross-cultural interactions, and then make the necessary adjustments when interacting with various cultures (Ang & Van Dyne, 2008). Nelson (1996) identified higher levels of cognitive strategies that promote deeper processing for developing new rules for social interaction associated with Metacognitive CQ. Leaders with high Metacognitive CQ listen, observe, and reflect on how the rules of social/business engagement are similar to, or differ from, their own. This then cues a global leader to focus on both the verbal and nonverbal presentation of new information, appropriate feedback, conflict resolution, and negotiation strategies. Three of the key factors for developing Metacognitive CQ are the ability to withhold judgment, excellent listening skills, and keen observational skills. Those who have the ability to question their own assumptions and demonstrate a nonjudgmental attitude are ready to move past their own self-imposed cultural barriers.

Cognitive CQ

A person's understanding of a culture's customs, conversational patterns, and norms learned through educational and personal experiences is referred to as Cognitive CQ. Moreover, Cognitive CQ refers to both the knowledge of cultural universals and differences (Ang & Van Dyne, 2008). Murdock (1987) suggested that cultures share some universals, such as patterns of communication, the use of tools, ways to obtain food, economic activities, and aesthetic preferences. Cognitive CQ is essential in helping global leaders gain insight regarding a culture's values, communication patterns, and systems. This in turn cultivates a better understanding of a given culture and how to navigate its nuances.

Motivational CQ

According to Kanfer and Heggstad (1997), Motivational CQ emphasizes how much an individual wants to learn about another culture. That is, how invested is someone in making the effort to learn, reflect, learn from failure, and persevere through the process of moving past the novice stage. Motivation CQ includes one of the major components of Hope Theory. According to Snyder (1994), "agency" refers to how much someone wants something, and whether or not she believes she has the capacity and resources to achieve the goal, or can bring together the resources necessary to make it happen. The common elements between CQ and Hope Theory will be discussed in detail regarding the power of finding the "golden thread principles" found in both theories.

Behavioral CQ

Behavioral CQ is the ability to demonstrate effective and appropriate verbal and nonverbal interactions across cultural differences (Ang & Van Dyne, 2008). This is where

knowledge meets the real world. Leaders' actions demonstrate what they truly embrace. If a leader holds to his own assumptions and refuses to question those assumptions, it will be communicated and possibly come across as ethnocentric arrogance. On the other hand, behavior fully integrated with an open, nonjudgmental, and respectful mind will communicate something of great value. Never underestimate the power of perception when it comes to people making a determination if someone is genuine and authentic (Avolio & Gardner, 2005). This is what makes the difference between conflict associated with communicating across cultures and the ability to form productive relationships built upon trust and understanding.

Cultural Intelligence and Kolb's Experiential Learning Theory

Cultural Intelligence can be learned, developed, and is associated with successful cross-cultural experiences (Early & Ang, 2003). David Kolb's (1984) Experiential Learning Theory (ELT) provides an excellent model for understanding how to move from an experience to experiential learning (Ng et al., 2009).

Within ELT, the Experiential Learning Cycle (Kolb, 2015) describes how learning occurs through the creative tension of four learning modes: Concrete Experience (CE), Reflective Observation (RO), Abstract Conceptualization (AC), and Active Experimentation (AE) (Kolb, Passarelli & Sharma, p. 213, 2014). Learning takes place as one progresses from having a concrete experience (CE), reflecting on the experience in an effort to understand the meaning of the experience through thinking about what happened and by engaging in conversation with others to consider multiple perspectives via Reflective Observation (RO), gaining insight from the experience and related knowledge using Abstract Conceptualization (AC), followed by applying what one has learned through Active Experimentation (AE). Moreover, the cycle

repeats as we are constantly revising our learning and relearning. Conflicts between how a leader processes and transforms information into new knowledge changes her thinking. These changes are commonly referred to as “learning”. Indeed, it is the interaction of the person and the environment that makes learning experiential. Merely having leadership experiences around the world does not guarantee learning. It is the process of engaging in experiential learning that helps global leaders increase their CQ.

The relationship between the Experiential Learning Cycle and CQ presents rich insights for beginning to understand how one can develop higher levels of CQ. Kolb’s ELT is a dynamic view of a learning process that focuses on resolving the dual dialectics of action/reflection and experience/abstraction and the dialectics of grasping and transforming experience (Kolb, Passarelli & Sharma, p. 213, 2014). Viewing learning as a process is helpful in understanding CQ’s developmental nature and how one may advance in attaining a higher level of CQ. As one begins with an experience in the Experiential Learning Cycle, the stage is set for becoming more aware of one’s interaction with the experience. It is in the reflection of the experience where leaders gain an understanding of what occurred, how it relates to personal knowledge, consideration of different perspectives, and how it differs or is similar to current knowledge, skills and attitudes. Whereas Metacognitive CQ calls for the ability to reflect on cross-cultural interactions, the Kolb Experiential Learning Cycle fine tunes the ability to engage in deep reflection and thereby gain new insight regarding what was learned during a cross-cultural interaction. This includes thinking about assumptions and any contradictions between erroneous assumptions and real-time experience. Hopefully, it is through reflection where new insights are gained regarding cultural assumptions. Following insight, the Kolb Experiential Learning Cycle calls for an application of insights gained. This directly relates to Behavioral CQ by way of

demonstrating more appropriate verbal and nonverbal interactions across cultures. Moreover, once someone realizes there is a lack of knowledge of a given culture, then Cognitive CQ plays a motivating role for increasing one's knowledge of a culture's customs, conversational patterns and norms. A more detailed study of Kolb's Experiential Learning Cycle is highly recommended for developing deeper insight into CQ and Kolb (see Ng et al., 2009 for an excellent presentation of CQ and Experiential Learning Theory).

Cultural Intelligence and Hope Theory

Snyder and Lopez (2014) describe hope as having three essential components. The first is Envisioning a Clear Goal; hope is focused on a specific outcome. The second component is Pathways Thinking and the third is Agency. Pathways thinking includes our perceived capacity to anticipate the need for, and the discovery/creation of, multiple routes to our goals. Pathways thinking creates alternate routes when our original ones are blocked. It helps us anticipate potential barriers and respond by developing different strategies for overcoming the barriers. Agency refers to motivation and capacity for finding, creating, and using alternate routes. Agency is fueled by perseverance and resilience. If one pathway fails, we find or create another.

One of the most promising tenets of hope theory is that we can make hope happen (Lopez, 2014). Hope can be learned and is a force that propels us toward goal attainment. Moreover, hope is inspirational and transformational. A hope-filled person will persevere when others give up. Increasing one's CQ is challenging, requires learning from our mistakes, and a mind-set characterized by a determination to move past obstacles. When others only see brick walls, a hopeful person sees alternate possibilities (Lopez, p. 20). Finally, hope includes the heart and the mind; it emerges when our rational selves meet our emotional selves.

In a statistical analysis of over 100 hope studies, (Valle, Huebner, & Suldo, 2006) found the following:

1. Hope leads to a 12 percent gain in academic performance
2. Hope leads to a 14 percent gain in workplace outcomes
3. Hope leads to a 10 percent boost in happiness
4. A group of high-hope salespeople produce six times as much as their low-hope colleagues

What does the hope meta-analysis teach us about hope and CQ? First, hope leads to improved academic performance and will enhance Cognitive CQ. That is, since knowledge acquisition is a vital part of Cognitive CQ, hope will also increase the ability to attain new knowledge of other cultures. Second, workplace outcomes correlate to goal attainment, which in turn is related to Behavioral CQ and its unique set of goals. Third, an increase in happiness is connected to the benefits associated with positivity (Fredrickson, 2001, 2009). More specifically, within an environment of positivity, cognitive flexibility increases, as well as creativity. That is, positivity creates an environment that facilitates the process of letting go of old assumptions and behavior patterns, while being flexible enough to adopt new ones. Positivity also enhances creativity, an essential ingredient for learning how to adapt to new environments (Kaufmann & Sternberg, 2010).

Developing CQ is not an easy task. Learning to understand another culture, reshape our erroneous assumptions, and mastering the behavioral skills for effective interactions calls for a strong sense of vision and persevering through consequences associated with imperfection. It also requires adjusting our behaviors when we fail, and a belief that we are able to increase our CQ. More specifically, developing CQ is directly related to hope. Hope will clarify what one

wishes to accomplish through CQ. Finding and/or developing multiple pathways for learning more about a given culture increases the probability of reaching the goal. Finally, hope provides motivation via the desirability of goal attainment and a sense of mastery (Pink, 2009). Indeed, it is the synthesis of having a clear goal, pathways thinking and agency that increases the probability for attaining effectual Cultural Intelligence.

Cultural Intelligence and Immersion Experiences

Tarique and Takeuchi (2008) conducted a study to determine if the number of international nonwork experiences was positively related to the four components of CQ and if the length of international nonwork experiences moderated the relationship between the number of international work experiences and the four components of CQ. Their findings demonstrated a positive relationship between the number of international nonwork experiences and higher levels of CQ. The results for the mediating effect of length of the experiences had mixed results.

It is interesting to note that the immersion experience of short-term missionaries did not result in higher levels of CQ. In Livermore's study (2008) of short-term missionaries, he found that they were mostly unaware of their own ethnocentrism following the short-term trip and demonstrated bounded-set thinking, a form of reasoning that simplifies things in polar opposites. In fact, they did not reflect on their experiences and failed to engage in experiential learning. Consequently, the short-term missionaries did not grasp the nuances of other cultures. Moreover, short-term missionaries did not realize how their values created an ethnocentric interpretation of Scripture. For example, the generosity of the missionaries and its negative consequences went unnoticed. A Ugandan church leader said, "We did not know we were poor until someone from the outside told us (Schwartz, 2004, p. 32).

Moreover, research on cultural immersion experiences for teachers indicates that teachers' attitudes and beliefs impact student learning (Wiest, 1998). Teachers who do not understand students from other cultures may project their erroneous assumptions on their students and possibly contrive a harmful self-fulfilling prophecy. If a teacher assumes a student will perform poorly, the teacher's behavior toward the student will seek to reinforce the misbelief. The power of self-fulfilling prophesy is supported by a rich data base (Jussim, 1986; Jussim & Eccles, 1992; Rist, 1970; Weinstein, Gregory & Strambler, 2004).

If one desires to increase CQ by taking short-term trips to other countries, it must be intentional, with an awareness of one's biases, a desire to learn, a willingness to admit a need to learn, an openness to learning from mistakes, and a commitment to put into action a new set of knowledge, skills, and attitudes. Increasing one's CQ requires investing in a difficult process and a high level of motivation to work through the discomfort associated with change, especially letting go of old biases/perspectives and internalizing new ways of viewing the world.

Personal Reflections from Six Weeks in Peru

In May of 2014, I travelled to Lima, Peru to study Spanish for six weeks. I studied four hours a day with a private tutor. My "education" began with learning how to negotiate cab fare. Speaking with the taxi drivers in Miraflores, Peru called for critical reflection of an assumption (Mezirow, 1998) regarding licensed taxis and taxi meters. Existing assumptions regarding payment methods and safety were reevaluated based on new cultural guidelines. For example, it is not wise to hire a taxi outside the airport in Lima, since they are not regulated and may result in being driven to an isolated location and robbed by the taxi cab driver's friend who received a text to meet you at the isolated location on his motorcycle, break the window with a spark plug,

and take your valuables. Regarding cab fare, I needed to change my assumptions about what is a “fair fare” and negotiate a price for the trip. Excursions to the Wong Supermercado to purchase groceries were another experience with new customs, new foods, and a new language. On one occasion, I assumed Customer Service would be friendly and that I could access exchanging dollars for Peruvian Soles at the store. Instead, I was greeted with cold indifference and given an insufficient reason for the lack of service. As I reflected on the experience, I realized that my affiliation with the United States was not an asset at the Wong Supermercado. Indeed, I was wrong about Wong. I missed Steedman’s (1991) important concept of realizing that social context is a part of creating meaning; conducting business within a different social context had unique implications for me as a foreigner in Peru.

Since I went to Peru with the intention of learning a language, my experiences attempting to speak Spanish within the class setting and outside in the community filled my days with making mistakes. It was disheartening at times, realizing how much I did not know. However, an unexpected benefit emerged; I began to realize how much I did not know about the culture. King and Kitchener (1994) wrote about different stages for the development of reflective judgment. In this instance, I began to see knowledge as a process and activated the construction of a well-informed understanding of the culture through reasonable inquiry as I compared and contrasted cultural similarities and differences. Perhaps being in a “learning mode” helped me see things more clearly. I observed, listened, and reflected on what was happening in Lima. In addition, there seems to be something about language study that provides hints about a culture and increases cultural intelligence (Parameswaran, 2014). For example, the respect given to individuals (unlike the Wong Grocery Store) is reflected in the language, as well as the rich vocabulary used to express emotion. Salutations for expressing good will, concluding a written

communication with the words “hugs and kisses”, and physical proximity painted a picture quite different than what I experienced in the USA.

As I reflect on the experience, I realize I only skimmed the surface in understanding the culture. There are nuances in every culture, invisible to the untrained eye. I will be returning to Lima for more language study and plan to focus more on observing, listening, and asking questions as I converse with my friends there. There is one thing I know for certain: I don't know much.

Practical Steps for Increasing CQ

Based on the information presented, the following are suggestions for increasing CQ:

1. To enhance Metacognitive CQ, begin with an attitude of humility, knowing you have erroneous assumptions about other cultures. Listen, observe, and reflect on how the rules of social engagement differ from that which is familiar. Withhold judgment and expect to challenge your personal ethnocentric assumptions. Consider immersing yourself in another culture via travel and study the language while you are there. Develop friendships that include honest feedback about how you are coming across. Work on increasing your Emotional Intelligence (see Goleman, 2005).
2. To increase your level of Cognitive CQ, read books/articles to gain a deeper understanding of diverse cultures, ask questions and listen to the responses from individuals who live or have lived in different parts of the world, notice cultural nuances, and commit to lifelong learning. Consider travelling to another country to learn more about the social, political, and economic dynamics. Remember, experiences do not automatically lead to experiential learning. Review Kolb's Experiential Learning Theory and repeatedly take yourself through the four stages.

3. To develop Motivational CQ, clearly identify the benefits associated with increasing your Motivational CQ. Study more about Hope Theory and how Agency will help you move closer to gaining a keen understanding of other cultures. In addition, consider how Pathways Thinking and Resiliency will help you work through the discomfort of making the necessary changes in your knowledge, skills, and attitudes.
4. Finally, you can take your Behavioral CQ to the next level by acting on what you are learning. Follow the lead of the locals in a country you visit or those you interact with at home; look for rules for proximity, customs for greetings, and facial expressions.

Develop a strong sense of self-awareness and how you are coming across to other people. Monitor your behavior according to how you are developing relationships or alienating others through your behavior.

Summary

Cultural Intelligence (CQ) and its cognitive/behavior skill sets have much to offer global leaders in their pursuit of reducing the ambiguity associated with working across cultures in various parts of the world. Ang and Van Dyne's (2009) Four-Factor Model of Cultural Intelligence provides an excellent model for understanding CQ's four essential components: Metacognitive CQ, Cognitive CQ, Motivational CQ, and Behavioral CQ. Leaders have the capacity to enhance their proficiency in all four components.

The paper examined the relationship between CQ and Kolb's Experiential Learning Theory (Kolb, 2015), with an emphasis on the power of reflection and application. Hope Theory (Snyder, Lopez, & Pedrotti, 2011) added to a deeper understanding of enhancing and activating CQ through the use of Agency and Pathways Thinking.

Immersion experiences (Tarique & Takeuchi, 2008) reinforced the possibilities related to enhancing a leader's CQ, as well as their power in connection to Kolb's Learning Theory. Personal reflections of the author's time in Peru studying Spanish added to an experiential reflection of the Four-Factor Model of CQ, Kolb's Experiential Learning Theory, and immersion experiences. Finally, practical steps for increasing a global leader's CQ completed Kolb's Theory through insightful application, helping leaders move from experience to experiential learning.

CQ elucidates an essential part of becoming a more knowledgeable, insightful, and effective global leader. Moreover, CQ can be learned and enhanced; the promise of continuous improvement allows for unlimited growth. As leaders interact more frequently and more intimately with diverse cultures, CQ emerges as a pathway to increasing the quality of our interactions across the world. Indeed, it is essential for global success.

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