



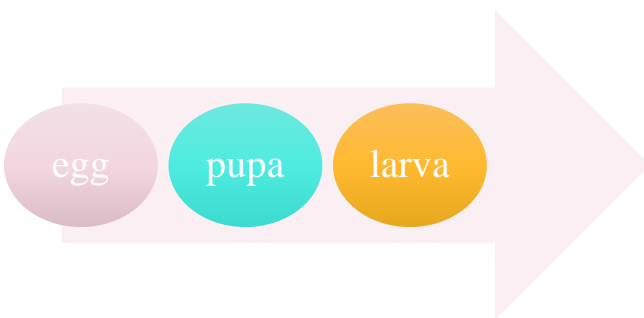
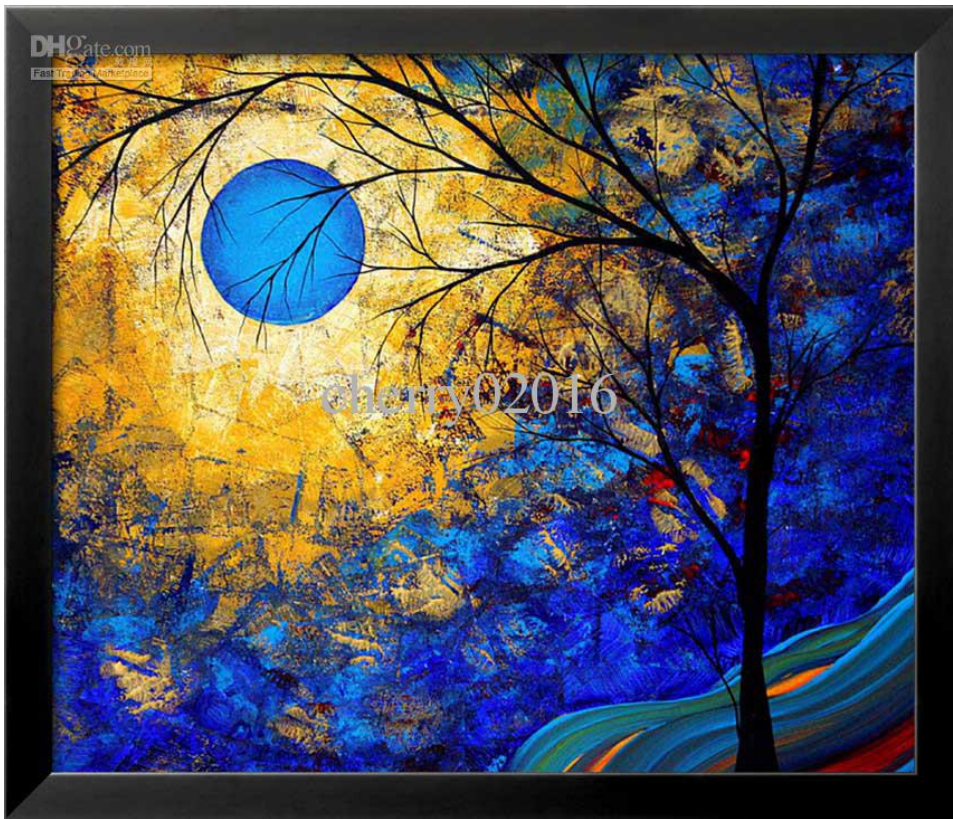
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The theme of both Volumes I and II is “Developing a Global Mindset.”

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Creating a Socially Conscious Campus—Service Learning and Study Abroad Programs

By *Dalia Juarez*

Introduction

American author, and mythologist, Joseph Campbell dedicated his academic life to the study of the human experience across cultures. Much like the work of Carl Jung and his archetype theory, Campbell believed that regardless of time, culture, and history people shared common experiences that bound them together. Unfortunately, too often people in one culture will look through egocentric eyes at other cultures. Americans have long been criticized for their egocentric tendencies and actions. No longer are Americans simply citizens of their country; they are citizens of the world. As such, institutions of higher learning have developed curriculum that provides students opportunities to become global, socially conscious leaders. The student of today must know how to lead in both the domestic and international arena. While there are various colleges and universities offering majors in Leadership it is simply not enough to learn from a text how to be an *agent of change* one must have an opportunity to practice those theories.

Purpose of the Paper

The purpose of this paper is to show how colleges/universities, such as Pepperdine University, can partner with the non-profit organization *Pack for a Purpose* in creating international Service Learning projects for their students in an effort to promote socially conscious leadership. Specifically, the work uses Pepperdine University's EDOL program, which is offered through the Graduate School of Education and Psychology, as an example of how students, who are already required to travel abroad to Placencia, Belize, can strengthen their understanding of course material (ethics, international leadership, and leadership theories) by participating in a Service Learning project where they assist three organizations that have self-identified through *Pack for a Purpose*: Placencia Humane Society, St. Alphonsos' RD School, and the Placencia Heath Center. By developing, implementing, and sustaining a service-learning project

Pepperdine GSEP program can increase their social capital both in the United States and in Placencia, Belize. The service learning project is not just about American students “giving”, but it is a mutually beneficial relationship whereby the organizations in Belize can have their needs met and students can increase their global understanding of a developing country, thus allowing them to rethink the nature of power, history, and agency.

Methodology

The thesis of this paper is grounded in a review of literature related to Service Learning. There are two specific topics pertinent to the discussion here. The first portion of the literature review examines the overall benefits of service learning to the student. There is also mention of the benefits of service learning to the academic institution as well. Lastly, the research entailed examining the need to prepare students for study abroad; considerations and preparations that must be made. Part of this discussion includes examining the importance of reflection to the post service-learning experience.

Service Learning

Service learning has long been seen as a tool for active learning; this practice provides students with an opportunity to see that there is indeed a correlation between their academic studies and the applicability of such studies in the *real world*. “In an international society, many challenges, such as humanitarian aid, disaster relief, medical assistance, literacy, and education development, rely on global collaboration between nations” (Change, Chen, Huang, and Yuan, 2012). Some scholars indicate that service learning can have a transformative effect on the student enabling them to have greater intercultural competence, language skills, appreciate language differences, and are able to tolerate ambiguity, and have a strong understanding of the complexity of global problems. Service learning projects are mercurial and can take place at any point in the semester. “...short-term service projects [are] gaining popularity as semester-long or yearlong study abroad programs become too expensive for many students” (Urraca, Ledoux & Harris III, 2009). Unlike traveling for the sake of being a tourist, students who study abroad do not need to make their own accommodations or plan excursions; the

college/university will do the majority of planning to ensure the travel experience correlates to the academics. “For example, the trip may be tied not to a specific course, but to a set of courses in a department....The trip may also be a culminating experience for a particular program” (Urraca, Ledoux & Harris III, 2009). Service learning projects are intended to cement the course material by allowing students to apply what they have learned in a *real life* situation.

Socially Conscious Leadership

Solving social problems in an ethically responsible manner is the definition of *socially conscious leadership*. Paulo Freire believed that in order to help the disadvantaged regain their *humanity* one must precede with an understanding of the oppressor’s role in the formation of such a relationship. As such, it is the responsibility of those attempting to solve social problems to do so with integrity. The world is no longer so vast that people in one society are ignorant to the plight of others. The smallness of the world can provide those interested individuals, opportunities to help people in need. As Thomas Friedman has written *the world is flat*.

For the student of today this flat world is more accessible through the practice of *studying abroad*. Students today are tasked more than ever before with applying their learning to the global market. It is no longer prudent to simply be a critical thinker; one must now be a global critical thinker.

Students need not wait till they have graduated college to begin to attempt to tackle world issues and concerns. Institutions of higher education offer students the opportunity to study in foreign countries. Not only does the foreign study allow students to meet their graduation requirement, but also perhaps more significantly students are provided an opportunity to learn about global citizenship, global leadership, and global responsibility.

Literature Review

Service learning is not volunteerism. When a person volunteers they donate their time and energy to an organization, usually a non-profit, because they may have altruistic

needs they are trying to meet. While service learning can provide an individual with a feeling of altruism the purpose of service learning is to connect the classroom with the *real world*. Students commit to completing a certain amount of hours or a certain project for the sake of connecting that experience to the classroom curriculum. While many colleges and universities offer courses with a service learning component it has become increasingly popular for American students to complete international service learning projects. These projects are either conducted after students have completed a class in the states (theory) and then they travel abroad to apply what they have learned to a *real world* scenario (practicum). For the students this is an opportunity to broaden their global awareness, to learn about another culture, or to help a community in need. Service learning programs, especially those that take students outside of their comfort zone, should be a partnership involving the host country and host programs. This literature review examines the benefits of service learning and the importance of providing students with an opportunity for reflection upon their return.

Benefits of Service Learning

Collaboration and cooperativeness are not fields one can earn a degree in, but rather they are the type of soft skills desired by employers. While there can be several ways of incorporating this component into the classroom one of the most mutually beneficial ways to do so is through service learning. “Advocates of service-learning argue that a wide range of personal and communal benefits arise when students engage in meaningful community service activities that are integrally related to rigorous academic work” (King, 2004). Before a student moves out into the organization, he/she will assist, it is important to explain how the service-learning project will complement the course outcomes. “Academic service learning is an educational experience that can be practiced at all levels of education; it unites experiential components, civic engagement, and classroom activities. As such, the goal of service learning courses is to enhance each student’s sense of civic responsibility while fulfilling the academic objectives of individual courses or curricula” (Urraca, Ledoux, and Harris III, 2009). In years past service learning was something that a few instructors, in few colleges implemented in all or some of their classrooms. Recent years have seen colleges and universities embrace

service learning. Many institutions offer service learning as part of program curriculum. As well, service learning has also begun to be used as a learning tool in study abroad programs. Such a focus has given study abroad programs a new face, a new definition. Most colleges and universities in the United States offer a student the opportunity to study abroad. In the early 1920s wellborn American students were given an opportunity to spend part of their academic year on *the continent*. The idea was that a student's perspective would expand and grow. As the years passed these programs became opportunities for students to learn a new language or experience the culture. For some, study abroad is synonymous with privilege and exclusivity. With tuition being what it is today not many students can afford to study abroad and often those that do get a chance to travel to, for example, Europe have the financial means to do so. "An antidote to the perception that study abroad is elitist, extravagant, elementary, and ephemeral is making skeptics and detractors more aware of the exceptional educational value international study provides" (Dean and Jendzurski, 2013). By building solid service learning programs, where there is a strong correlation between learning and action, students studying abroad can redefine what it means to learn actively.

This means that the service learning implementation has to be meaningful and clearly define for the student what the intended outcomes are and how they relate to the course content and objectives. "Empirical studies have found that participation in international service increase learners' intercultural competence, language skills, appreciation of cultural difference, and tolerance for ambiguity" (Chang, Chen, Huang, and Yuan, 2012). The flatness of today's world demands the modern scholar to have cultural awareness as well as cultural sensitivity.

It is imperative for the college student of today to have global understanding, global perspective, and global literacy of the issues, concerns, problems, and changes taking place overseas. Thus, providing students with an opportunity to engage in service learning in foreign countries, through a socially conscious scope, can be beneficial for both the host country and the student. "Some choose to participate in international work with the hope of contributing their time and knowledge to a local community, whereas some use such opportunities to gain overseas experience for their future careers" (Chang,

Chen, Huang, and Yuan, 2012). It is important to note that such a change in perspective and such enriching experiencing do not simply occur by sending students overseas. The significance of these studies is that they indicate how service learning can help American students broaden their cultural capital by implementing classroom learning into a *real life* situation.

Intercultural Reflection

It is the responsibility of the college, its faculty, staff, and students to prepare, not just, for the experience, but their return as well. A student who has never traveled abroad probably has a very limited understanding of the ins and outs of the foreign country they will visit. American norms and standards are very different and unique. There is a danger that the student's ethnocentric perspective may mar their experience abroad. As such, pre-travel education regarding the foreign country they will visit is important. "Strong service learning programs recognize and include the strengths of each partner [students, faculty, and agencies] in the activity. This requires consciously working to develop what Hooks call 'authentic help' wherein those providing 'help' don't assume their superiority over those being helped (1994)" (Vickers, Harris, and McCarthy, 2004). For an American student to simply think of themselves as the *helpers* places them in a position of cultural superiority. This is one of the reasons why it is important that the service-learning project entail a discussion from all parties involved.

...[T]o counter the tendency of privileged students to consider themselves the "providers" of service for those "less fortunate" than themselves, they must be made aware of how they too benefit from the service experience. The benefits to the local communities tend to be readily apparent: investment of time, energy, and creativity. Those benefits accrued by the students may be less so: knowledge, learning, perspective broadening, and personally rewarding relationships. (King, 2014)

If such an experience is to take place then colleges and universities offering international service learning opportunities must be willing to help a student understand their role as a socially conscious leader traveling abroad. "...[A] history of domestic community

service does not translate into a readiness for meaningful self-reflection or for intercultural understanding and dialogue” (Urraca, Ledoux, and Harris III, 2009). Advocates of international service learning emphasize the need to give students an opportunity for reflection about their experiences as a method for deep learning.

Simply stated, service learning links academic instruction with community service guided by reflection (McCarthy 2000)” (Vickers, Harris, and McCarthy, 2004). “Reflection helps students “prepare for, succeed in, and learn from service experiences” (Toole & Toole, 1995, p. 100) by focusing their attention and providing a venue for observation questioning, speculation, and self-awareness (Acosta, 1995). (King, 2004)

All too often the international experience comes to an end the moment the student and faculty board the flight home. Their only moment of reflection often takes place in a simple exchange of dialogue among friends and family. Such questions as “*how was it?*” Or “*did you have a good time?*” do not provide the student adequate opportunities to talk about their experiences.

Reflection is considered the critical piece in service learning as without it student’s involvement in service remains as some form of volunteering or ‘feel-good’ exercise without linking student’s experiences with curriculum content, or with more considered analysis of the social conditions giving rise to severe need in the first place (Arts, 2001)” (Vickers, Harris, and McCarthy, 2004).

A lack of reflection is a disservice to the college, its students, and those helped by the student’s work. Students must be given an opportunity to talk about their experiences; not only among them but also with the rest of the campus community as well especially is such service-oriented trips are to take place again. Allowing students to share their experiences helps to promote their growth as leaders in the campus community. Reflection need not start when the student lands on American soil. Reflection can start on the flight home.

As students board [for] the flight [home], the faculty members [can] give students three questions to consider: 1. What lesson of leadership most inspired you? 2. What memory will you tell others when they ask about this trip? 3. With [identify country of visit] behind you, what commitment will you make during the [upcoming semester] to employ some of the lessons learned through service that you will report back to the group...?...While all three questions merit attention, having students address the “What memory will you share?” inquiry proves especially valuable....images of human suffering often challenge students to find the appropriate word or phrase to capture the moment....Students need a safe place to put into words what they have witnessed” (Dean and Jendzurski, 2013).

In the United States institutions of higher learning, from two-year colleges to universities offering doctoral programs, provide students with opportunities to learn both in and outside of the classroom. Study abroad programs offer students opportunities to become global learners and citizens who can take full advantage of the culture and country in which they are learning. These study abroad partnerships, while very enriching seem, too often, one sided. Students volunteer, research or intern in a country of choice and once the semester or year is over the student returns home having earned their credits.

“Without post-travel engagement, the broader campus community remains excluded from the vast educational value international study affords;...” (Dean and Jendzurski, 2013).

Reflection does not have to be a complicated process, nor is it intended to be an act of minutia. Reflection allows students to engage, and think deeply about their experiences, with others who have been privy to the same experience, its positives and negatives. As well, it is an opportunity for students to teach the campus community of their service-learning studies.

Pack for a Purpose and Pepperdine’s Graduate School of Education and Psychology

By following a traditional model of studying abroad, students are missing out on an opportunity to utilize and strengthen their leadership skills, while still in the states, so that their visit can have a lasting and positive impact from the very first day of their stay abroad, thus being agents for socially conscious change.

Rebecca Rothney founded *Pack for a Purpose* shortly after she and her husband returned from a trip to Botswana. While the tour company in Botswana had a forty-pound limitation on luggage weight she realized that the airlines allowed her a one hundred pound suitcase. As they made plans to return to Botswana in the following year she and her husband planned on visiting a local school, Mabele Primary School. Rothney and her husband contacted their tour company to determine if they could identify any specific needs the school may have. Upon their return the Rothneys delivered one hundred and forty pounds of school supplies and soccer balls to the school. “It was enormously rewarding to be able to help the people in the community that had given us such a life-changing experience” (Rothney, 2014). Since Rothneys initial visit to Botswana she and her fellow friends have made several trips to Africa and donated about one thousand pounds of clothes, school supplies, and medical supplies. Rothney says her *a ha* moment came when she asked the African travel company why no one else had brought donations before. The travel agent simply stated, “no one thinks to do so”. Logistically, Rothney knew that bringing donation goods required a great amount of time and cooperation from the touring company. By asking travelers to bring five pounds of good Rothney knew they could involve more people who wanted to add value to their trip. By delivering the donated goods to the traveler’s accommodations a traveler could contribute without having to figure out the logistics of how to get the donation to the site in need. Five pounds would take up very little space, but still have the power to make a large impact. Thus, was born *Pack for a Purpose*. A total of fifty-one countries and over one hundred organization have become members of *Pack for a Purpose*. Participating through *Pack for a Purpose* is very simple. Lodgings and travel companies simply need to place the *Pack for a Purpose* logo and link on their website, along with a *Pack for a Purpose* disclaimer, submit their project application and commit to one hour of their time throughout the year. The responsibility for keeping information current is that of the organization seeking donations.

Simply stated, Pepperdine University and in particular its Graduate School of Education and Psychology have a great opportunity to increase its reputation as a socially conscious leader by using the information provided from *Pack for a Purpose* to develop

and implement a service learning project in Placencia, Belize allowing Pepperdine students to collect donated items for three community organizations in Placencia. By having GSEP students begin the service learning project the semester of the trip, EDOL students have an opportunity to utilize the theories learned in their courses, apply those theories to a *real life* task, and increase their social capital by thinking purposefully about the trip prior to their arrival.

Conclusion

Individuals often use the work *transformative* to describe the shift that takes place in a student who has studied in a foreign country. By participating in Foreign Service learning programs students are given the opportunity to be self-reflective, to self-evaluate, and to change. These are becoming increasingly important aspects in a world that is no longer spread so far apart. If the modern student is expected to be a global citizen, then education should be globally focused.

Citizenship is now the crucial identity. We need to think about what an adequate civic education means today, and what it means to be a citizen. We need education-based community service programs. We need experiential learning, not just talking about citizenship but exercise in doing it. (Barber, 2002)

The focus on service learning as an active teaching and learning tool is a pedagogy utilized by colleges and universities across the United States. Such experiences are beneficial to the students in multiple ways: students experience culture outside of the U. S, they apply classroom knowledge to a *real life* problem, and perhaps most importantly they gain an understanding of what it means to have a social conscious when traveling abroad. By utilizing the information found in *Pack for a Purpose* Pepperdine's GSEP's EDOL program and its students have an opportunity to give, rather than simply take, from Placencia, Belize and its residents; thus enabling individuals to be socially conscious leaders.

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Assessing the Viability and Sustainability of Global Entrepreneurial Ventures using the SPELIT Power Matrix.

By: Tom McCluskey

International Center for Global Leadership Conference

Belize, July 2014

Introduction

The era of the global entrepreneur is upon us. There are several factors that lead to this undeniable conclusion. The first is that we live in an increasingly global economy. The latest figures from The World Trade Report show that international trade increased by 5% in 2011, with manufactured goods leading the way with a 6.5% increase (WTO, 2013). While these percentage increases may seem nominal, they are not. Consider that in 2011, the world was just beginning to recover from The Great Recession of 2008 and 2009. At that time, businesses were not in growth mode, but in fact had been paring back operations, which is never a sign of a robust economy. International trade in 2011 outpaced Gross World Product growth, which grew by 3.9% (International Monetary Fund, 2014), meaning that business growth was being fueled by international rather than domestic commerce. Take into account the enormous base figures that define the international marketplace and these percentage increases become more remarkable. In 2011, the top five product groups for world exports, according to the World Trade Report were as follows (WTO, 2013):

Product Group	Market Size
Fuels:	\$3.171 Trillion
Non-Pharmaceutical Chemicals:	\$1,500 Trillion
Food:	\$1,356 Trillion
Automotive:	\$1,287 Trillion

Telecommunications:

\$633 Billion

Though the global economy had suffered a severe recession, the desire by countries to negotiate Preferred Trade Agreements (PTAs) continued its two decade-long meteoric rise. By 2011, the number of PTAs more than quadrupled from under 70 in 1990 to over 300 in 2011 (WTO, 2013 International Trade Statistics). Giving further hope for continued growth in international trade is the fact that in 2011, only 16% of all merchandise sales were a result of PTAs (WTO, 2013 International Trade Statistics). The desire for continued global trade remains strong and the opportunities for increases in global trade are substantial.

The growth in international trade is only one factor that has ushered in the era of the global entrepreneur. The other is that public policy decisions made by world governments as well as international organizations have made it almost impossible for businesses not to outsource critical business functions that were once the domain of internal employees. In the United States, the Congressional Budget Office predicts that the Affordable Care Act, passed in 2010, will cause the loss of 2.5 million U.S. jobs from 2014-2024. (Congressional Budget Office, 2013). The reason for this is simple; the Affordable Care Act requires businesses with 50 or more full-time employees to provide paid health insurance coverage. As financial analysts at U.S. companies determine that their organizations cannot sustain their operations with these increased costs, they will decrease employee hours so that many workers will not qualify as full-time employees and thus, the company will not be required to pay for and provide health care coverage for them. These employees will need to make up the lost revenue and are very likely to become entrepreneurs by offering their current professional skills as independent contractors to multiple companies rather than work full time for one company that may have hired them prior to the rules of the Affordable Care Act.

The United States is not alone in this trend. As austerity measures continue to be pushed in the Eurozone, governments that once assured lifelong employment protection and benefits for its citizens will no longer do so. To minimize costs, European

companies could reduce employee protection practices and as a result, these European citizens could be forced to solicit their services as independent contractors to domestic or international companies. With this push-pull mechanism in place (the growth in international trade pushing the expanse of a global economy and the increased demand for outsourced and temporary employees pulling workers toward becoming independent contractors), it is easy to see how the stage is set for explosive growth in global entrepreneurialism.

Since the failure rate for entrepreneurs is high (depending upon the source, that rate ranges from 50-90%), it is not enough for an entrepreneur to have favorable market conditions to prosper. Global entrepreneurs must astutely analyze their own organizations, the marketplace and its customer needs. In this era of the global entrepreneur, a standard SWOT analysis may not accurately assess a new venture. To succeed, a global entrepreneur needs a more sophisticated, yet customizable means to assess their venture's viability and sustainability. That's where the SPELIT Power Matrix can be utilized.

The Elements of the SPELIT Power Matrix

SPELIT is a framework that emphasizes knowing the social, political, environmental, legal, intercultural and technical view of an organization (Schmieder-Ramirez & Mallette, 2007). In using the SPELIT Power Matrix to assess the strengths and weaknesses of an individual or organization, the results will be more informative and provide deeper data than a traditional SWOT analysis. By defining six critical elements of individual or organizational function and providing a clear look at the positive and negative standing of the organization, its individual members, customers and the marketplace, the SPELIT Power Matrix gives a more substantial reflection of whether the individual or organization is positioned for success or not. While the SPELIT Power Matrix provides more in depth data that is critical to evaluating an organization, it is also very versatile. One of the greatest strengths of the SPELIT Power Matrix is the flexibility to use some or all of the elements to meet the specific needs of the organization.

Having a clear definition of each element in the SPELIT Power Matrix is essential in using it correctly to assess an organization. The six elements are as follows:

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.
- (Schmieder-Ramirez & Mallette, 2007, p. 28)

The importance of knowing each element, how they interact with each other and how they can be applied in an individual or organizational analysis can't be understated. The social element is critical because organizations exist to serve human needs (Bolman & Deal, 1997). As the use of social sciences to determine best practices in an organization have become more commonplace, understanding the social elements of an organization, its customers and the marketplace is critical in its chances to succeed. The political analysis framework can be viewed as how an organization deals with competing interests, views, assumptions and values (Schmieder-Ramirez & Mallette, 2007). This element ties in closely with the intercultural element and helps to galvanize action among an organization's members. The more organized the "troops" are in an organization and the more that certain values are espoused together, the more successful that organization is (Schmieder-Ramirez & Malletet, 2007). Many organizations understand the economic element as cost analyses are prevalent in every industry and with good reason. "The accumulation and consumption of resources is an essential activity of an organization in achieving its mission and requires thoughtful planning" (Schmieder-Ramirez & Mallette, 2007, p. 71). As laws, policies and procedures are ever evolving, the legal element requires careful analysis. Yet analysis of the legal element goes beyond understanding statutes and policies. Since organizations are made up of people and exist to serve people, natural law also comes into play in a legal analysis. Natural law presumes that

mankind's rational, God given ability, allows humans to conclude that which is good and evil (Schmieder-Ramirez & Mallette, 2007). The intercultural element blends the social and political elements, so that the organization must understand the differences of varied cultures to create an effective working arrangement between them. Since technology's relevance to information helps the organization align itself to industry standards, the technology assessment should strive to align IT infrastructure with current and future services of competing organizations (Schmieder-Ramirez & Mallette, 2007).

These elements don't operate in a vacuum, they all affect one another. There is much overlap and interaction between them and these overlapping and interacting aspects must be considered and understood. Knowing this ecosystem and its interactions will be of paramount importance for those who want to set their global entrepreneurial venture on the path to success.

Analyzing an Entrepreneurial Venture Using the SPELIT Power Matrix

When using the SPELIT Power Matrix or any other means to analyze an entrepreneurial venture, the critical factor is the industry that the venture is in or is looking to be in. All six factors of the SPELIT Power Matrix will be different depending upon specific industry dynamics. Further, the importance of some elements of the power matrix will differ by industry. For a caterer, the social element of the power matrix may be more critical than the technology element. For someone in the import/export business, the legal element may be the most key as there will be different statutes in the marketplaces in which this company operates. Also, depending upon the specific industry in which an entrepreneurial venture operates, the elements of the SPELIT Power Matrix that may be omitted from the analysis will vary as well.

The purpose of this paper is to provide a general understanding and application of the SPELIT Power Matrix. Since the variables among industries and organizations are vast, no specific industry or organization will be assessed. This overall view of the SPELIT Power Matrix will serve the greatest number of entrepreneurs.

As stated earlier, organizations ultimately exist to serve human needs. In analyzing a venture, a current or perspective entrepreneur needs to honestly assess if they or their organization meets the needs that people have for that particular industry. There are three critical factors to look at when doing a social assessment:

1. Awareness. An acute awareness of self, of others, of your environment (situation and context) is stressed. (Schmieder-Ramirez & Mallette, 2007). The entrepreneur needs to consider their own strengths and weaknesses, what competitors in that industry have to offer and what is the human need people are looking to meet from individuals and organizations that operate in that industry.
2. Focus on Relationships. From a social perspective, a key facet in accounting for organizational dynamics and performance is the extent to which human needs for connection are being met (Schmieder-Ramirez & Mallette, 2007). What makes you or your organization strong in providing that vital human connection? What can you do to improve in that area versus your competition? Will being strong in this area allow you to prosper?
3. Service. Is there an orientation to serve others and commitment to their highest development? (Schmieder-Ramirez & Mallette, 2007). Focusing on these three critical aspects of the social element will allow an entrepreneur to gauge how well they or their organization is positioned for success in this area.

The political element is arguably the element that has the potential for the greatest shift over the course of a long term analysis. Because of this, the political element should be revisited on a regular basis. If an entrepreneur does business in a variety of countries, will a change in political parties in power in one or more of these countries affect business? How is the individual or organization positioned if these changes do take place? How quickly can an entrepreneur capitalize on these changes? Albert Einstein once stated “politics is more difficult than physics” (Reardon, 2005, p. 2). An effective leader knows mastering such difficulties in the political scene is important, both within

and outside of the organization. The SPELIT Power Matrix helps to keep this leader informed of the increasingly evolving aspects of politics and power so that a complete and thorough analysis can be accomplished (Schmieder-Ramirez & Mallette, 2007). The political element requires constant updating and analysis for an entrepreneur to fully understand how politics are currently affecting their chances for success now and how they will in the future.

As the balance sheet goes, so goes the organization. Evaluating the economics of an entrepreneurial venture is critical to do correctly at the start of the venture. Minimizing costs while maximizing economic gain is easily understood but difficult to actualize. It is essential that the entrepreneur assess the economic element multiple times to insure that the course they wish to chart is the right one. The assessment of costs and expenditures is a dynamic process where the estimated expenditures are used to determine the needed resources while the availability of resources constraints the expenditures. Planners must achieve this delicate balance while considering the other SPELIT factors (Schmieder-Ramirez & Mallette, 2007). The resources and costs to analyze vary by industry, but there are several aspects of being an entrepreneur that nearly every venture will experience no matter what industry they compete in. These factors are:

1. Cost. Launching the venture will cost more money than originally thought.
2. Time. It will take the venture longer to become profitable than originally thought.
3. Profitability. When profitable, the profit margins will initially be smaller than originally thought.
4. Negative influencers. There will always be people that tell the entrepreneur that they will not succeed.

With careful economic planning as it relates to the SPELIT Power Matrix, the entrepreneur may not avoid the first three points, but they can avoid proving the naysayers in point four right.

Much like the political element, the legal element requires astute attention to the ever evolving nature of this factor in a SPELIT analysis. Much as an organization needs

to stay apprised of the political landscape, the knowledge of policies and procedures in systems are vital to an organization's success (Schmieder-Ramirez & Mallette, 2007). Constant changes in legal policies in the global marketplace bring opportunity to those entrepreneurs that regularly stay updated on legal changes in their important markets. For example, an entrepreneur that makes solar panels would want to know that Sebastopol, CA and Lancaster, CA recently legislated that newly constructed homes must have solar panels (Trabish, 2013). This same entrepreneur would also want to keep updated on Germany's far reaching pro-renewable policy for consumer and commercial construction that mandates the use of solar panels (Carlyle, 2013). Knowledge of the inner workings of these legal policies would aid the entrepreneur in expanding their business in these markets. There are also different liability and labor laws across all markets that entrepreneurs must have a working knowledge of in order to legally conduct business. An entrepreneur is well advised to analyze if they and/or their organization are properly positioned to meet the legal demands of their industry and to do so on a regular basis as the laws constantly change. They must also make sure that all their stakeholders believe that the organization is adherent to Natural Law, that the global entrepreneur is inclined to do good and not evil towards others.

Intercultural competency is an important facet to an entrepreneurial venture's success and this competency will only grow in importance as the global marketplace and international commerce increase. There are several models an entrepreneur may use to help build intercultural competence. Perhaps the most relevant is The Development Model of Intercultural Sensitivity (DMIS) created by M.J. Bennett, a model that relied on extensive research and has received much validation. (Schmieder-Ramirez & Mallette, 2007). The six phases of this model are:

1. Denial (indifference or ignorance of cultural differences).
2. Defense (we-they thinking).
3. Minimization (recognizing intercultural differences but ignoring them and focusing on similarities instead).
4. Acceptance (recognizing cultural differences and understanding that one culture is not better or worse than another).

5. Adaptation (shifting frame of reference to put oneself in another culture's shoes).
6. Integration (completion of intercultural competence by successfully integrating diverse cultures). (Schmieder-Ramirez & Mallette, 2007)

Whether an entrepreneur uses this or another intercultural competency model, the intercultural element in a SPELIT Power Matrix analysis cannot be overlooked. To do so would prepare an entrepreneur for failure in a global venture. By contrast, understanding, valuing and accepting differences is critical to the success of a current or aspiring global entrepreneur. Developing an intercultural competence maximizes the potential benefits of a diverse workforce and marketplace (Schmieder-Ramirez & Mallette, 2007).

Advancements in technology demand that the global entrepreneur stay abreast of these advancements and decipher how their organization can best utilize them. While the temptation is strong to silo IT and leave it to the technology experts, the entrepreneur does so at the risk of having their venture become less competitive. The use of technology has two key purposes. First, it must be relevant to information and business in order to be used by employees in the operation of the organization (Schmieder-Ramirez & Mallette, 2007). Second, employees aren't the only stakeholders to consider when analyzing the technical element. The entrepreneur must consider how their IT systems will mesh with customers' systems and with their industry as a whole.

Advancements in technology can be compelling, but these must be utilized to grow the business and not be utilized for technology's sake. Social media can be a great business tool to obtain new customers, but many entrepreneurs fall into the trap of blogging for the sake of blogging rather than using it as a means to boost sales. Relevant technology varies by industry, but in analyzing the technology element in a SPELIT Power Matrix evaluation, the entrepreneur should consider five systems as part of a basic framework. These include IS (Information Systems), IT (Information Technology), TPS (Transaction Processing Systems), MIS (Management Information Systems), and DSS (Decision Support Systems). A careful evaluation taking into account each system will better ensure the accuracy of information (Schmieder-Ramirez & Mallette, 2007). This in turn will help the global entrepreneur better evaluate the technology element of their organization to make sure they can successfully compete in the global marketplace.

Conclusion

There is compelling quantitative and qualitative evidence that we are now, undeniably, in the era of the global entrepreneur. The growth in international trade outpaces overall global production. Every year, more PTAs are signed, breaking down trade barriers and increasing the number of preferred international trade partners. While the number of PTAs has quadrupled in the past 20 years, trade from these agreements accounts for only 16% of all international commerce. The window of opportunity for continued growth in international trade is wide open. One day soon, the lion's share of any global entrepreneur's revenue will come from international customers. The global marketplace presently provides the greatest growth opportunities and once these opportunities are actualized, international trade will be the majority of commerce.

As government decisions such as the Affordable Care Act in the United States and austerity measures in the Eurozone continue to cause businesses to reduce employment rolls and outsource duties that are critical to their success, the world's workers will be forced to become entrepreneurs. They will either be individual consultants or build businesses that employ a small number of people to capitalize on the opportunities that global outsourcing will bring.

In *The Art of War*, military general, strategist and philosopher Sun Tzu writes "every battle is won before it's ever fought." As in war, preparation, knowledge and a keen sense of discernment are vital to the success of any business. No entrepreneur, global or domestic, goes into their venture desiring to lose. They intend to win. With the ever growing and complex global market, the need for more sophisticated ways to analyze an organization and its chances for success is heightened. A SWOT analysis is simply not enough anymore. The SPELIT Power Matrix offers a more relevant, more in depth system for determining how an individual and an organization are positioned for success in the global marketplace. While a careful SPELIT analysis does not guarantee success, it does enable the global entrepreneur to be better prepared to succeed by providing a better understanding of the organization, the individuals who make it up,

customers and the overall marketplace. When used properly, the SPELIT Power Matrix will be one of the global entrepreneur's sharpest tools.

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Engaging, Educating and Empowering Leaders for Maternal Health

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Introduction: background and purpose of program

Maternal mortality is a major threat to women's lives in developing countries. While maternal health outcomes have improved in some countries over the past few decades, rates of maternal death remain alarmingly high. Every minute, a woman dies in pregnancy or childbirth and over 300 million women in poor countries suffer from maternal morbidity. In many countries, the majority of mothers do not receive the most basic health care and quality care during childbirth—when both the mother and child are most at risk—is often unavailable.

To reduce maternal mortality and morbidity over the long-term, emerging public health leaders need to be equipped with the skills, commitment and vision to respond fully to

multiple causes and consequences of this threat. Social development in many emerging nations has stalled largely because leaders continue to apply old tools to increasingly complex problems. Practitioners of leadership development programs seek ways to encourage adaptation among individuals and organizations in order to solve tough problems.

The purpose of this paper is to present a model that aims to advance the skills and strengthen the commitment of emerging leaders in maternal health. The paper will outline the specific program strategy, coupled with case studies, that is required to cultivate a cadre of professionals with a long-term commitment to improve maternal health worldwide.

Drawn from the experiences of the Maternal Health Young Champions program, a recently concluded multi-country program in Sub-Saharan Africa, Latin America, and South Asia, which was a partnership between the Maternal Health Task Force at Harvard School of Public Health (MHTF) and the Institute of International Education (IIE), this paper will provide details of program design and approach that ranged from leadership workshops to mentorship, networking opportunities and policy dialogues. The paper will also examine the evaluation of achievements of the program's overarching and intermediate goals; impacts at individual, organization and community level; and lessons learned in program implementation. It is hoped that sharing of best practices among practitioners of leadership program will have a multiplier effect globally.

Program Model: elements of program design and implementation

The Young Champions of Maternal Health Program (MHYC), started in 2009, was the first international fellowship to focus specifically on supporting a new generation of global leaders dedicated to improving maternal health. The second cohort of the program, started in 2012, was a partnership between the Institute of International Education and the Maternal Health Task Force at the Harvard School of Public Health. The MHYC Program offered a unique fellowship to ten young people who are passionate about improving maternal health in their home country. The Young Champions (YCs) were matched with in-country mentors from selected organizations for a nine-month research or field project

internship focusing on a particular area of maternal health. The fellowship included leadership training and participation in the Global Maternal Health Conference in January 2013 in Arusha, Tanzania.

The MHYC program was managed by a program officer in each of the four countries of activity – Ethiopia, India, Mexico and Nigeria, a global program manager, and a global program director. Country program officers were responsible for regular monitoring of the Young Champions, facilitating the in-country selection process, maintaining communication with mentors and host institutions, and reporting the progress, achievements and challenges of the Young Champions. The global program manager provided overall program coordination, development of communication materials, website maintenance, and financial management. The global program director oversaw the smooth implementation of the program, provided support and networking opportunities for Young Champions and mentors, and was the primary point of contact with the MHTF team.

The overarching goal of the Maternal Health Young Champions Program was to reduce maternal mortality and morbidity by cultivating a cadre of emerging public health leaders equipped with the skills, vision, and long-term commitment to improve maternal health worldwide. To accomplish this goal, the MHYC Program proposed to:

1. Advance the skills and strengthen the commitment of emerging leaders in maternal health by providing young professionals an opportunity to gain practical experience working on the front lines of a complex global public health issue.
2. Connect leading maternal health experts in each target country with the Young Champions in a mentorship capacity, creating networks to promote the cause of maternal health in countries or regions where this is most needed.

The MHYC Program included the following program elements:

1. Participation in the 2013 Global Maternal Health Conference in Arusha, Tanzania
2. Leadership workshops
3. Nine-month research and/or field-work internship

4. Individual mentoring
5. MHYC Blog

The Young Champions were recognized during the plenary session of the Global Maternal Health Conference in January 2013, at the beginning of the MHYC program. The Young Champions (YCs) enjoyed several days attending sessions, net-working with colleagues from 70 countries, and interacting with their mentors and other experts in the field of maternal health. The conference was a unique opportunity to: (1) introduce the Young Champions as emerging leaders in the field at a global level and (2) familiarize the Young Champions with global topics related to maternal health and connect them with other researchers and practitioners in their individual focus-areas.

Two leadership workshops were held during the program – at the beginning and end of the internship period. The first leadership workshop was held in conjunction with the Global Maternal Health Conference and included all Young Champions and most of the mentors. During this workshop, the Young Champions completed exercises to help them identify their strengths as leaders and their leadership style, to define their individual goals for the MHYC program, and to help them recognize their role and “what it means to be a Young Champion.” Several team building exercises also strengthened the bond between the Young Champions and the Young Champions and their mentors.



The second leadership workshop was held at the end of the program and included all the Young Champions and the India mentors. During this workshop, the Young Champions shared their experiences and research findings, discussed the achievement of their program goals and outlined next steps, beyond the end of the formal program.

Each Young Champion was placed in a nine-month internship with a host institution in their own country. Placements were made based on the individual focus-areas of the Young Champions and the area of expertise of the host institutions. The ten organizations that participated in the program are identified in the table below.

Organizations that participated in the MHYC Program	
Ethiopia	Engender Health Ethiopia
	Family Guidance Association of Ethiopia (FGAE)-Southern Area Office
	St Paul's Hospital Millennium Medical College
India	Indian Institute of Health Management Research (IIHMR), Jaipur
	Society for Nutrition, Education and Health Action (SNEHA)
	Tata Steel Family Initiatives Foundation (TSFIF)

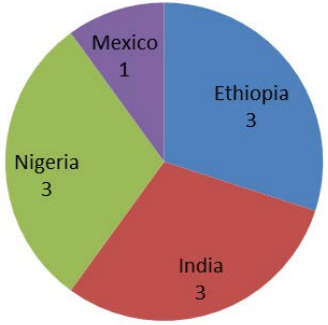
Nigeria	Common Heritage Foundation
	Excellence and Friends Management Consult
	Health Education Initiative for Women
Mexico	Observatorio de Mortalidad Materna

Within their host institutions, each Young Champion was paired with a senior-level researcher or administrator who served as a mentor. The role of the mentor was to provide guidance for the research and/or field-work of the Young Champion, expand the professional network of the Young Champion, monitor the achievement of program goals, and generally support the professional growth of the Young Champions.

The Young Champions shared their experiences – challenges and successes – and research findings through a shared blog administered by MHTF. This blog was meant to be a way for the YCs to learn about each other's progress and to allow their mentors, host organizations, colleagues, and other professionals to read and comment on their posts. Depending on their access to an internet connection, Young Champions wrote every one to four weeks. There was active discussion among the Young Champions and the blog was available to a wide global-network. The Young Champions and mentors used this blog as an outlet to share ideas and observations about maternal health in their communities.

By electing participants into the program who were already committed to promoting maternal health issues, the goal of the MHYC Program was to provide the Young Champions with the practical experience and professional skills to increase social change in their home countries. The theory of change that underlied the program evaluation was the hypothesis that the MHYC Program provided the Young Champions with a professional opportunity that caused individual outcomes related to knowledge and behavior, but also social outcomes that went beyond the individual. As a result, IIE decided to analyze the outcomes and impacts of the MHYC program not only among the Young Champions, but also the potential effects of the program in their home communities and within their global YC network.

The Maternal Health Young Champions are students or young graduates in public health or a related field who are committed to improving maternal mortality and morbidity through research or innovative field work in their home country. The participants chosen for the MHYC Program come from four countries: Ethiopia, India, Mexico and Nigeria. The following table presents the participant demographics.

Participant Demographics	
Country of origin	Sex
 <p>A pie chart illustrating the distribution of participants by country of origin. The chart is divided into four segments: a blue segment for Ethiopia (3 participants), a red segment for India (3 participants), a green segment for Nigeria (3 participants), and a purple segment for Mexico (1 participant). The numbers 3, 3, 3, and 1 are placed within their respective segments.</p>	70% Female
	30% Male
	Average number of years of experience in maternal health prior to internship: 3.55 years

Case Study Nigeria: Dr. Ashiru Abuakar – working with rural communities

As a Maternal Health Young Champion in Jigawa State, Nigeria, Dr. Ashiru Abuakar built a deep understanding of challenges to maternal health in rural areas that allowed him to develop trusting relationships and to communicate best health care practices within communities, as well as to advocate for better policies.

"The Maternal Health Young Champions fellowship program has to a greater extent exposed me to the wider maternal health community and them to me. It has developed my capacity to become a better advocate of maternal health through research and constructive engagement with the community and policy makers in ensuring good attitude, policies and accountability in maternal health, especially in Jigawa state, Nigeria."

Dr. Ashiru Abubakar has a Bachelor of Medicine and Bachelor of Surgery from Bayero University Kano, Nigeria. Recognizing the role of obstetric hemorrhages in many maternal deaths, Ashiru pushed for an unprecedented blood donation campaign for the maternity

unit of the Murtala Muhammad Specialist Hospital Kano. This campaign yielded over 200 donated pints of blood – one of the highest in the country. As a voluntary blood donor himself, he has helped to dispel some of the misconceptions in the region about blood donations.

The main causes of maternal mortality in Northern Nigeria is Ashiru's maternal health focus. He had been competently guided by his mentor Mr. Umar Farouk Wada, who has done great work for Health Education Initiative for Women. Ashiru's research focus had been firmly steered by his belief: *'The process of pregnancy and child birth is a physiologic process, and a thing of joy, and should not constitute disease, death, or agony to the families and communities. Therefore, an effort to make this process safe and joyful is the greatest service to humanity.'* Ashiru's mentor organization works in 44 communities, 14 of them include activities related to Ashiru's research on the attitude of health care workers; hence, he had to visit at least two health facilities in two different communities daily during his internship.

Ashiru summarizes his journey in the program and his quest for the improvement of maternal care through improving provider attitudes by saying, *'Even though poor health provider attitude is conceived by all as a barrier to maternal health utilization, in Jigawa state, Nigeria about 80% of the respondents acknowledge good attitude from health workers in Jigawa, and significant proportion attribute poor health provider attitude to poor client/client-relatives attitude.'* He and Chinomso Ibe Traffina, another Young Champion from Nigeria, were two of the three awardees for the 'MamaYe' award for leadership in maternal care in 2013. Ashiru's journey took him deep into rural Jigawa where he had the distinction of having a baby named 'Azer' after him as a tribute, for it was the first baby in the village delivered by a doctor.

In recognition of his outstanding service in maternal health, Ashiru was selected as a participant in the African Young Leaders Initiative for the 2014 Washington Fellowship program to study civic leadership. Ashiru continues to serve rural and remote communities

in

Nigeria.

Case Study Mexico: Luz Maria Soto Pizano – evidence-based clinical protocols

As a Maternal Health Young Champion in Chiapas, Mexico, Luz Maria Soto Pizano developed research, professional and personal skills which enabled her to approach her work in maternal health from a fresh perspective. *“In my experience, applying evidence-based clinical guidelines on maternal health care needs to be focused. One guideline for each unit should be considered as a final target, keeping all users that might be pregnant, indigenous women in the loop. This should lead into developing medical skills to generate specific protocols and consider certain conditions on an individual basis.”*

Ms. Luz Maria Soto Pizano has a Medical Degree from Universidad Autonoma Metropolitana in Mexico City and a Master’s Degree in Rural Development. She has worked on maternal health issues for several organizations and has volunteered in Mexico and Haiti. Luz Maria is passionate about her job, she is concerned about the well-being of the community she is working in and is open to enhance her abilities and knowledge to improve her professional capabilities. Preceding the fellowship, she worked as a coordinator at Casa de la Mujer in Chiapas and had greatly contributed towards improving results of the organization’s work.

Dr. Rosario Cardenas of Observatorio de Mortalidad Materna guided Luz Maria in comprehensive field work in Chiapas where she traveled to remote and underserved areas to support the work of her host institution and built relationships with the indigenous communities she worked with throughout her program to ensure women receive the best possible attention and information: *‘I love fighting for the dream that, in my country health would be a right that women may fully enjoy, not merchandise or a privilege. I also dream that inequality is not any more a risk for women's lives. This program will help me to make these dreams come true.’*

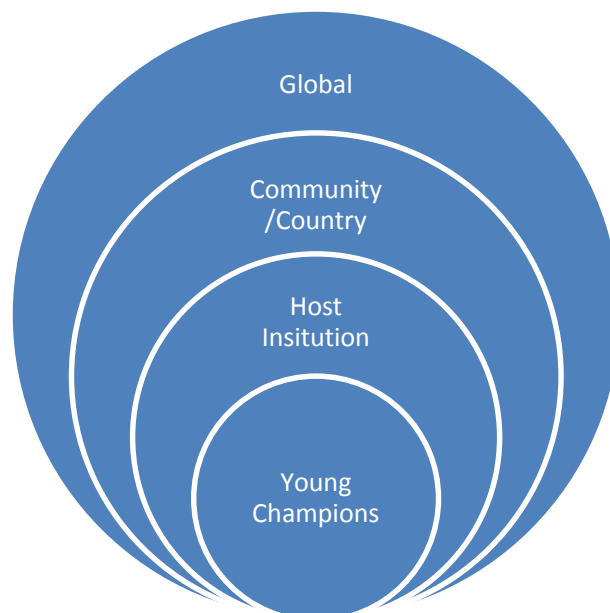
During her internship, Luz Maria saw herself as an intermediary between the community and the different public health care institutions. This experience allowed her to bridge the ethical, socio-economic and gender issues facing communities in Chiapas and the health care provider perspective in order to facilitate better communication and health care practices. For Luz Maria, bridging both sides of the issue of inadequate procedures and communication in these communities was a turning point as a maternal health practitioner.

As a result of her work, she was invited by the Ministry of Health in Mexico to collaborate as the coordinator of maternal health in the jungle region of Chiapas, a region with one of the highest maternal mortality ratios in the state. As maternal health coordinator, Luz Maria will be managing programs and developing strategies to improve maternal health care and reduce maternal mortality. She will be working with the more than a thousand communities and health care providers, which includes both the ministry of health and traditional birth attendants, in the region. Luz Maria sees this new responsibility as maternal health coordinator as a challenging project, but as she articulates, as a Young Champion she feels prepared for the task at hand: *“This is a challenge for me, but the Maternal Health Young Champions program gave me all the skills to develop self-confidence, the capacity for negotiation and the knowledge to analyze and apply programs for maternal health care.”*

Impact: evaluation of the program’s achievements of overarching and intermediate goals; impact on individual, organizational, community and global levels

The MHYC program was evaluated to determine if the program goals were successfully completed and to assess the implementation efficacy. The goals of the comprehensive evaluation were three-fold:

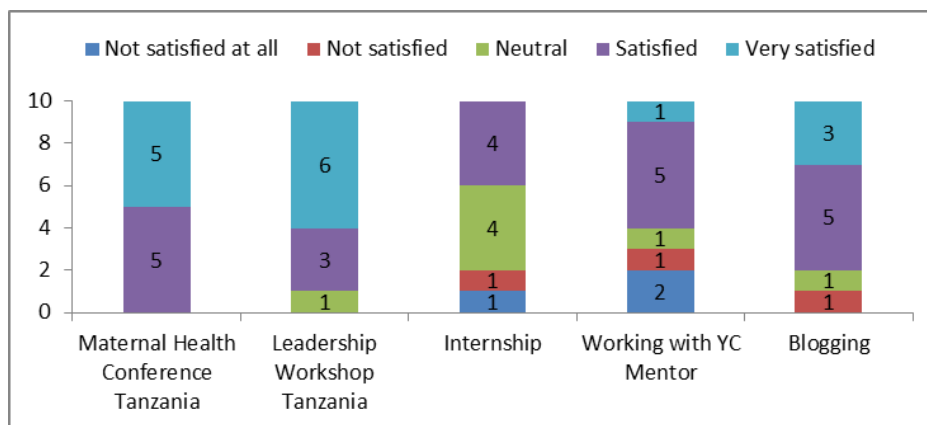
1. To evaluate the achievement of the MHYC Program overarching and intermediate goals
2. To assess the expected outcomes and impacts of the MHYC Program on the Young Champions and their mentors using a four-tier model (see graph below)
3. To assess program implementation and identify lessons learned in order to guide follow-on activities and potential future programming related to maternal health fellowships



A qualitative approach was used for the summative evaluation. The study team conducted interviews, focus groups, and distributed questionnaires to 27 key stakeholders (including the Young Champions, their mentors, host institutions, IIE and MHTF staff) in five countries: India, Nigeria, Ethiopia, Mexico and the United States.

Participant Satisfaction

Most Young Champions were either “satisfied” or “very satisfied” with the expectations of the program, in terms of what they would accomplish as a result of the experience. The Young Champions were asked to assess their program satisfaction with the MHYC program components, and the findings are as follows:



Practical Experience in Maternal Health

The evaluation respondents were asked if the Young Champions gained practical experience in the field of maternal health as a result of the MHYC Program. All responded in the affirmative. The practical experience the Young Champions gained included researching relative issues, learning through observation and being exposed to important community issues. A few of the Young Champions were more specific in saying that they learned how their host organization worked and how to work alongside other health care practitioners and field workers.

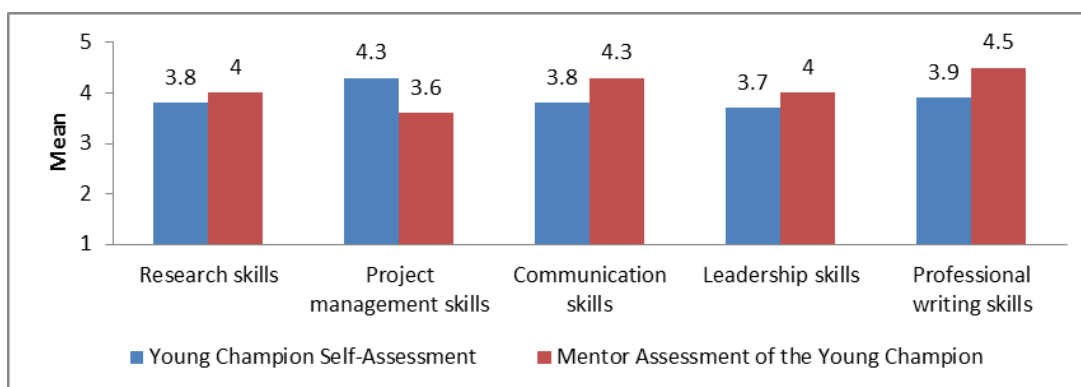
All of the Young Champions indicated that through different learning opportunities they were able to build on their previous professional experience and to improve their research skills in maternal health. Some of ways they have been able to improve include learning about research technicalities, conducting a research study independently, learning more about the qualitative process, finding relationships between previous and current research interests, becoming more involved with advocacy and gaining basic research skills such as designing the study, writing the proposal, data collection and fieldwork experience.

Technical Skills

One of the primary purposes of the MHYC Program was to advance the technical skills and knowledge of the Young Champions. This purpose was clear when the Young Champions expressed the goals of their projects. Most focused on the skills they would

like to improve or learn, specifically in the field of maternal health. Many discussed the exposure that the Program gave them to conduct fieldwork or learn more about specific issues in their countries. Five Young Champions also discussed being able to share the findings of their projects with other professionals in their countries, other Young Champions and Ministry of Health professionals.

All of the Young Champions in Nigeria and Mexico indicated that their professional development skills had improved; in India and Ethiopia, YC responses ranged from very little to a lot of improvement. As a result, improvements in skills varied significantly by country. Six mentors from India and Nigeria assessed the skills improvement of the YCs in their countries; on average, they gave higher assessment scores than the YCs in all categories except project management (see the figure below).



Overall, the mentors and MHYC staff agreed that the YCs improved their research skills, leadership skills, and their knowledge in the field of maternal health.

Professional Development

All stakeholders were asked to rate how much impact the MHYC Program has had on the Young Champions' overall professional development. Young Champions in Nigeria and Mexico indicated the highest amount of impact; India and Ethiopia the lowest. When asked how the program has made an impact, many referred to increased opportunities and further development of their interest in the field. As one Young Champion noted: "*Much influence.*"

From technical, practical, rural perspectives it has given me an on-the-ground professional outlook, changing my professional life. It has given me skills in a real-world setting and increased my opportunities.”

The MHYC staff, mentors, and host institutions supported the finding that the program impacted the Young Champions’ professional development. In particular, the respondents noted the changes in the Young Champions’ skills related to research, leadership, and management, their increased knowledge in maternal health, and their professional experience working with the host institutions. One mentor also added that the practical experience in all kinds of work can help the YCs identify focus areas in the future.

Along with professional development, the MHYC Program had a strong impact on personal development. During the interviews with the Young Champions it became apparent that the Program has left measurable impact on each individual. Through tears, one Young Champion shared that she is so happy to have gone through a personal change that even her friends have noticed. Although there were frustrations experienced by everyone involved, the challenges that the Young Champions faced supported their personal growth. As one YC noted: *“It opened my mind and gave me an opportunity to know more about the field and challenge myself, to question myself, to think about what could be my contribution. I have high expectations of myself now. I want to understand more about maternal health including the social issues. I reflect on issues in my country and commit myself to think about how we can develop.”*

Mentorship

The mentorship component, one of the key trademarks of the MHYC Program, was developed to provide guidance and support to the Young Champions during their research and/or community project implementation. The mentor had the potential to enhance the skills and knowledge of the Young Champion, guide and specify their project and internship and inspire the Young Champion to continue in the field of maternal health.

The mentors and their Young Champions were asked about the advantages of the mentorship component. Most respondents agreed that the mentors provided guidance for

the internship, taught the YC research and management skills, and exposed them to issues in maternal health. Most YCs and mentors also agreed that the mentorship was useful for keeping the internship on track and focused. For mentors, the experience provided them with an opportunity to focus on different maternal health issues and to learn to mentor and work with the Young Champion.

There were challenges in the mentor-mentee relationships related to communication, skills mismatch and compatibility, and program outlook. An interesting comparison was found in the YCs' and the mentors' relative points of view on the program outlook. While the Young Champions wanted to pursue their own research and sometimes looked at the mentors as barriers to this progress, the mentors discussed their role in the MHYC Program as that of a guide. Therefore, they took their role seriously and felt that sometimes the Young Champions were resistant. The mentors in India, for example, discussed the importance of flexibility and allowing room for *mentoring* to actually take place.

In general, the Young Champions felt agreeable with the relationship they shared with their mentor. All Young Champions agreed or somewhat agreed, for example, that their mentor was responsive and gave them feedback on their research. Six of the ten YCs agreed (and two somewhat agreed) that they were working on a team with their mentor, indicating favorable feelings of collaboration.

The least favorable views on the mentorship component were related to YC/mentor compatibility. Four of the ten Young Champions did *not* feel compatible with their mentor due to their matching skill set. This implies that there were some challenges with matching the mentor with the Young Champion and that it may have impacted the Young Champions' overall program experience. Similarly, three of the ten YCs did not feel that they established clear goals and objectives for the program with their mentors, which suggests that the Young Champions and mentors had differing perspectives on their mentor relationship.

Professional Networks

When asked if the mentor had facilitated opportunities to meet other professionals in the field of maternal health, six Young Champions responded *yes*, two responded *somewhat* and another two

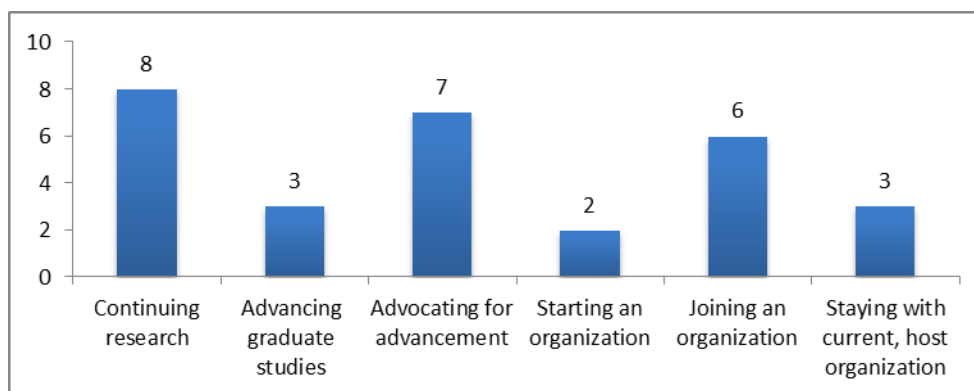
responded *no*. Interestingly, the Young Champions that responded *no* were not the same individuals that stated they had challenges with their mentor. Each mentor and Young Champion relationship was successful in supporting aspects of the program goals on a case-by-case basis.

Key Young Champion Networks	
Within Host organization	Strong bond with host institution and its employees
	Work with mentor and/or supervisor
	Job opportunities from host organizations
Outside Host organization	Tanzania Conference
	End of Program Event in Delhi
	Present work at conferences Invitations from other organizations to present results Featured in media, newspapers, and other outlets promoting maternal health issues
	Work with government officials and Ministries of Health
YC Global Network	

Commitment to Maternal Health

Each Young Champion was asked if they had an interest to continue to do work in the field of maternal health; all ten Young Champions responded positively. Half of the Young Champions indicated that they had no experience in the maternal health field prior to the MHYC Program. With all of the Young Champions now stating that they want to continue their program work, the Program has succeeded in fostering leaders that will remain committed to maternal health. The figure below illustrates the most common visions that

the Young Champions had for furthering their work in maternal health. It is important to note that the Young Champions offered these ideas and the evaluation team grouped them into common themes. Other responses included changing the attitudes of ignorant health care workers, training women to accept delivery assistance and seek care, ensuring evidence-based decision making, doing intervention work, and working in the field.



All of the Young Champions voiced their agreement in furthering the work of the MHYC Program and continuing to work on their research or implementation projects. As one of the mentors noted, it was palpable how much the Young Champions *internalized* the maternal health issues they worked on, and the passion to face the challenges of maternal health in these countries is within them.

Home Country Impacts

The impacts of the MHYC Program are evident in the projects and activities of the Young Champions in their countries: Ethiopia, India, Nigeria and Mexico. All stakeholders agreed that in their work and advocacy, the Young Champions do have an opportunity to promote maternal health issues in their home countries; in particular, three themes emerged in analyzing this potential impact.

Commitment to maternal health: As noted, the Young Champions are committed to addressing maternal health issues in their countries and working further in the field; thus,

the results of their work up until now and moving forward will provide exposure to key issues in their professional networks and spheres of influence.

Dissemination of project findings: The Young Champions have the potential to share the findings of their research and to contribute to maternal health work being done in each of the four countries. By presenting at conferences and meetings, in organizations or local community groups, and to government officials, these young leaders have the potential to bring issues that they studied to public attention. In at least four cases, the Young Champions or MHYC staff noted that the work of the Champions has been presented to local or national governments.

Impacts at the local level: In all cases, the Young Champions were able to work with local communities, whether conducting research or implementing a project. In their exposure to these communities they have increased their knowledge about maternal health issues in their country and have become key voices with the knowledge and contacts to work in the maternal health field. For those Champions who implemented community projects, some of their impacts have already been seen in the communities.

Global Impacts

Beyond the country experiences, the respondents were asked how the MHYC Program was contributing to maternal health issues worldwide. Some respondents were cautious to identify direct attribution of the program to broader global issues related to maternal health; others reflected on the aspects of the MHYC Program that can be quite impactful in the future, including the professional networks and the furthering of research in the maternal health field.

Global Network: The MHYC Program created a global network of Young Champions that is committed to working together and sharing their experiences and interests in maternal health issues. Exposure to fora such as the Global Maternal Health Conference allowed for the Young Champions to become well-known in the field and may provide further opportunities for them to

continue their work in the future. In the era of social media, the YCs are interested in maintaining their global vision through Facebook, blogs, and other outlets in order to keep this network sustained since *“it is an important idea that reaches many countries. It will improve the development of maternal health,”* according to one Young Champion.

Furthering Research in the Field: The second way in which the MHYC Program can influence global issues is in advancing research in the field, particularly through the work of the Young Champions in the program and after. Due to the comparative nature of the program design, the Young Champions were able to interact with each other and compare maternal health issues and research in each of the four countries. Now, the Young Champions have the opportunity to share their findings and to influence research or policy related to maternal health. As one YC states: *“It is a form of advocacy and cultivates advocates. We are working to contribute and make change. We are interchanging experiences with people from other countries.”*

All stakeholders were cautious to attribute major changes in maternal health due to the small number of Young Champions in the program. While the individual and local community impacts of the program may be more measurable, most respondents agreed that the Program will not be able to tackle all of the maternal health issues in these countries or worldwide. There was also the perspective that the impacts of the Young Champions will only be seen with time, when they are able to continue their professional careers and put their new knowledge to use. MHYC staff members observe “the MHYC Program has given the Young Champions an opportunity to practice on a global scale; it might be too early to say if there has been any significant impact. Perhaps in another year it may become more apparent.”

Finally, several respondents discussed their desire to see the program increase the number of Young Champions that benefit from the program. In their opinion, the program could serve more maternal health leaders and could be scaled up to larger program operations in these countries.

Lessons Learned

The overall program implementation was successful in meeting the goals of the program. The decentralized program management style with a point person in each country and two team members at the global level resulted in the ability to respond to immediate needs of program participants, provided clear communication, maintained a global vision, and allowed best practices to be quickly adapted throughout the program. To provide an even better experience to participants, there are a few recommendations for improvement that have been identified.

It is essential to allow sufficient time to set-up key program elements. In particular, the mentor-mentee matching process must be clear and participants should be given ample time to prepare for the experience. The IIE program management team and MHTF partners were on a tight time schedule to ensure selection of program participants prior to the 2013 Global Maternal Health Conference; as a result, some Young Champions were notified of their selection only weeks before the start of the program. For such a long commitment, participants could have used more time to set their affairs in order and mentally prepare for the fellowship. Also, some of the host

institutions did not have enough time to fully prepare for the arrival of the Young Champions, which could have been avoided with earlier notification. Perhaps most importantly, the program management team was not able to spend ample time on the process of selecting mentors and matching them with Young Champions; in a couple cases, this rushed process resulted in mentor-mentee partnerships without shared interests. In all but one case, this challenge was overcome during the program.

Clear expectations of program outcomes and stakeholder roles should be established. The program management team provided general guidelines for the mentor-mentee relationship with the original intention that these relationships should be as flexible as possible while still achieving the program goals. It became clear early on in the program that more specific guidelines and expectations should have been established from the beginning.

Mentors and mentees often had different perspectives of their roles and program outcomes were unclear to some key stakeholders, such as host institution staff. Through guided conversations, the program management team was able to help mentor-mentee pairs reach an understanding of their roles and to establish program goals but clearer expectations laid-out before the start of the program would have strengthened these relationships.

Conclusions

The MHYC Program began with the goal of providing young leaders interested in the maternal health field with the necessary professional and leadership opportunities to learn about and address key challenges and issues in their countries. From discussions with the key stakeholders of the program, the conclusions indicate that the program has achieved important outcomes in this regard. All ten Young Champions finished their programs successfully and their reflections indicate significant changes in their technical skills, knowledge, and commitment to advocate for maternal health in the future. Discussions with the mentors of the Young Champions have also indicated that the Champions created professional networks that will continue to support them and develop as they follow their career paths.

The MHYC Program concluded in December 2013 and the professional path of the Young Champions now begins. Throughout the program, these ten individuals have shown that their commitment to the cause is true and their resolution is strong. While the impacts of the MHYC program may only be at their beginning stages, it will be impressive to follow the Young Champions and learn how they will use these skills, networks, and opportunities in the future.

Leading Transformational Change using Ancient Tribal Wisdom and International Board Room Experiences

By: *Nancy Rosenfeld Daly, MBA, www.nancyrdaly.com*

Influencing executive teams to shift from reactive, incremental planning that lacks creative thinking, to major stretches of positive transformational change has been my work for decades as a facilitator and consultant to leadership groups. Creative and strategic thinking shifts organizations and individuals from limits and boundaries to holistic, integrated and planned expansiveness. Transformational shifts are not necessary every day or even every year, but when they are needed, that shift requires a new open mindset of possibility and vision and a willingness to break-through traditional leadership behaviors in order to excel in today's complex and sensitive local-to-global environment.

Working with Boards and CEO's, I have experienced the positive effect of authenticity in leaders that builds trust with their workforce and brings the human element into leadership that motivates and inspires employees to follow. Respect, integrity, intelligence, effective communication and listening are, of course, required as well. This is true with clients ranging from \$1 billion budgets to the smallest of clients.

There is a need for leaders to encourage, teach and inspire managers to shed safe, well-worn approaches and be willing to step out confidently with new methods that support visionary leadership. When we provide new tools and experiences that inspire courage, understanding and positive communication, we shape a motivated, cohesive global team, both internally with diverse employees and externally with worldwide suppliers, contractors, customers and stakeholders.

Mindshifts are required for major change to occur. New awareness of stakeholders as "whole persons" supports transformational shifts in high-performing

entities. This whole person perspective involves beliefs, experiences, memory, cultural teachings and different tolerances for change.

Part of any transformational process involves overcoming resistance to change, which requires acknowledging the instinctive human response of discomfort with uncertainty. Resistance to change is first discomfort with, and fear of, uncertainty. It's not the change itself at first that sparks resistance; it's the uncertainty. Questions such as: Who will be my boss? What will happen to my job? Where will I be located? are examples of uncertainty that stem from change. The majority of humans' initial response to uncertainty is discomfort, i.e., "dis-ease". For some it is momentary discomfort, as they quickly transfer anxiety to excitement for unknown possibilities. For others, there is severe stress from uncertainty that disrupts the mind (fear and worry), body (illness) and spirit (desire).

Strategies for reducing uncertainty, and thus discomfort, include inviting inclusion in discussions, sharing more information and investing in buy-in efforts. As a facilitator for change efforts, I design such strategies with knowledge attained from understanding what is required to successfully navigate through major change. This knowledge of the process of change comes from real-time experiences designing and leading teams, as well as, from ancient tribal wisdom handed down for generations through sand drawings.

Digging deeper, to understand the sequence and process of change as a leader, and what is required to successfully transform a business entity, community or individual, is the focus of this paper.

The Pollen Path, a Navajo Sand Drawing as Metaphor for Leading Change

An ancient Native American sand drawing from the Navajo tribe is used as a metaphorical teaching path. This sand drawing helps us understand in totality the steps

required to break-through limited thinking and grow to highest potential for the organization or individual. I use this sand drawing with CEO's, leadership retreats, personal growth and organizational shifts. It is referred to as the Pollen Path, with a maturing cornstalk in the center of transformational stages of actions and reactions to forward change. It is a profound teaching model used for business, tribes, communities and individuals.

The Pollen Path is used as a universal model to understand the process of accepting, initiating and thriving through change. The visual map reveals a linear and organic process that includes phases of change and the human response to each phase, as follows: Crisis or chaos to kick-start change; Awareness phases; Tormenters and ego release; Leap of faith and crossing a new threshold; Entering liminal space – not knowing what's next; Masculine/feminine traits needed; Process to learn anew; Allowing convergence; Planning; and, Reintegration in a new form.

During presentations and within this paper, you will be able to identify where you and/or your organization are on this path of embracing and leading change and your unique next steps forward to higher potential for the organization and for the individuals involved.

The sand drawing encourages reflecting at each stage to create a clearer understanding of what came before, what is, and identify a path to possibilities for future action. The model is holistic, it considers the whole of the individual, tribe, challenge or issue. The tribe would reflect, discuss, contemplate and together reveal what the next step is and when they are ready to move forward.

When I first discovered the Pollen Path teachings, it reminded me completely of my decades of work in strategic planning. Ancient and today, the path and journey are still instructive and valid. In a moment, we will enter the sand drawing, however, first its transferability to our world of leaders and organizations deserves a brief reference.

My Use of the Pollen Path with Business Entities, Leaders and Individuals

In 2003, I began speaking on the specific topic of transformational change in organizations and people. For the previous two decades, I was actively involved in strategic planning, first in the banking industry, next as a Chief Financial Officer leader, then as an independent consultant to national leaders and organizations. Change was my business, analytical thinking and processes were my tools, managing projects or teams was my playground.

Earlier, in the year 2000, I took off a year from consulting to refuel and recharge. By the end of that year, I had unknowingly transformed myself, my outlook and my priorities without realizing it. You don't know when you are actually transforming until after you have transformed and reflect on the differences between now and before. To analyze, judge or compare during the process is a waste of energy and a distraction. It is important to keep exploring and moving forward. Later, through deeper study, conversation and reflecting, knowledge of the process of transformational change for your specific situation will come together for you.

As a result of my year off to recharge and refuel, I was introduced to the Pollen Path at an invited gathering of 20 achievers in the area of Quality of Life. These individuals were respected and visionary psychologists, ministers, mayors, authors, deans of healthcare and others. It was at this special gathering that I learned of the Pollen Path and I realized this sand drawing described my own transformation and that of my business clients, perfectly.

Transformation Defined

In physics, to “transform” refers to creating a new form of energy, such as to transform ice to water, or water to steam. The energy of matter changes during and after transformation. You do not recognize what it was before because it is so different from that now. The way it interacts with other objects or energy is also different.

The same is true when an organization or individual transforms. A new form of energy is created. There is excitement that is palpable. There are new observations, new conversations, new procedures, new plans, new collaboration and new possibilities with new ability to achieve.

Transformation occurs in an organization usually intentionally, but when, how and by whom, are dynamic variables that require a letting go of past rigid processes and structures. Trust, encouragement and recognition are important fuel for exploration and change to occur.

Transformation in an individual is a more dynamic, spontaneous and committed series of actions fueled by courage and desire.

Transformation means a significant change, resulting in a different scope, outlook and direction. It can happen slowly over time or quickly in response to a crisis. It truly is a new form of energy to transform an organization or to see an individual who has completed all stages within the Pollen Path.

Stage 1. The First Step of Transformation

The first step in transformation, unfortunately, usually requires a crisis, trauma or a building up of chaos. There exists pain of some sort. Most humans - leaders and others - are not willing to enact a significant change or series of changes unless the status quo is so painful, difficult, outdated or chaotic, that they think: “We/I cannot go on like this. It’s unacceptable, dangerous, unhealthy, or we’re heading for a disaster or wipe-out.”

In an organization, this could be a new competitor, new regulations, new product or new technology that comes to market, requiring a complete reassessment for how business is done or how desirable their product is. Employee dishonesty or severe morale issues can also cause pain and suffering, impacting productivity and injecting chaos. A natural disaster, such as a flood or threat of drought, or demographic upheaval, can force transformation. A political shift or economic crisis can also inflict significant chaos.

The need for major change can be a sudden or slow awakening. Some may ignore or deny the data, invalidate the analyses, refuse to make decisions, or numb out with unhealthy patterns.

The first stage of transformation on the Pollen Path, as it relates to organizations, leaders, tribes and individuals, is at the bottom of the sand drawing depicted as a horizontal line and referred to as: the Line of Chaos. We may stay on the Line of Chaos for days, years or lifetimes. We may try to ignore the chaos, lack of productivity or discomfort, and we will never reach higher potential or feel fulfillment if we stay there.

At some point for transformation to occur, staying on the Line of Chaos is no longer acceptable. It may be physical or emotional pain, externally driven or internally inspired with a new vision or leader, but something has to occur to reach a point of: “No More.” Until there is an energy shift or mindshift to reject staying on the Line of Chaos, real change will not occur.

Once this is accepted, you have entered Stage 2 of the sand drawing.

Stage 2: Turning the Corner

At the left edge of the horizontal Line of Chaos, a 90 degree angle takes the line upwards. This edge, this corner, is called, “Turning the Corner.” At this point, the leader or individual or system becomes aware that they are in chaos, trauma or danger, and the status quo is no longer acceptable. The action plan for how to get out of chaos is unknown, but at least, there is an awareness and acknowledgement that doing nothing will not work.

You have “turned the corner” and are now Aware. Some may try to resist or deny awareness, but eventually, the chaos, trauma or danger is surfaced and acknowledged. Once acknowledgement has occurred, you can never go back and pretend that the chaos is not there. You are Aware. Now you enter Stage 3 of the Pollen Path.

Stage 3: Awareness

With acknowledgement and awareness of the chaos comes a brief or extended period of mourning. At first, the depth of trouble behind and the long road ahead can cause grief or fear of the unknown. You are separating from habits and attachments that have existed for a long time. However, with time and more discovery and awareness, you or employees become open to new learnings. The energy shifts to more openness and a search and quest to be better.

The Pollen Path draws a vertical line for Awareness, rooted in the moment of Turning the Corner and extending straight up. This becomes “heightened awareness” the further up the line you journey, indicating that Awareness evolves each day with greater and more Awareness. It is a cumulative process of learning and examining what caused the chaos, and learning that alternatives exist to be explored. Understanding the root cause of chaos can be a powerful transformational aid. The cause of chaos may not be

apparent until later in the process of change or it may be readily available, such as with a natural disaster, external force, or influential childhood experience.

This period of Awareness can be a shock to one's self-image or to the organization, with confusion or a feeling of loss, lack of clarity, or emptiness. The key for the entity to healthfully prepare for transformation is through learning to let go of what has always been. Awareness will lead to new questions and conversations, new thoughts, perspectives and actions – the beginning of the search quest that must be supported by the leader in order for break-through improvements to be discovered.

Once you have Awareness, **you can never go back** and not be aware.

During the stage of Awareness and in future stages, Ego release is essential, to clear the way to be open to new alternatives and possibilities. We must release associations and attachments with prior successes and failures that may have defined us or the organization. These Ego associations limit future expansive thinking. This is why it sometimes requires a new leader to transform a company; they have no attachments to the past. New leaders have fresh energy and ideas for what is possible in the future. New energy that leads to a new, improved and needed path.

Resistance to letting go of the past is a major block to transformation. A person or organization cannot move into the next phase holding on to old expectations. These beliefs, opinions or judgements must be let go to truly explore what can be. This release of associations can be very difficult, both with experiences of success and lack of success. The present and future are not the past in transformation. A new form of energy is created that is unpredictable in its totality of effect. That creation of new energy, plans, drive, and excellence is allowed by letting go of the past, not even thinking about it anymore, not giving the past our energy of time or thought. To devote time and energy to the past, steals time and energy from creating anew. So, the stage of Awareness is the time to observe, reflect, learn, then let go, be open and allow the journey to really begin.

Stage 4: Tormenters

We now have heightened awareness that the past no longer works, we need something completely new and fresh, and we have one foot in each world: in the current chaos that still exists and with the possibility of something positively transformational ahead.

On the Pollen Path sand drawing, there are two tribal figures, one on each side of the vertical line of Awareness. These tribal figures are **Tormenters** who awaken us to frailties, doubt and habitual existence. The Navajos know that these types of people, messages and habits exist. We must break-through self-doubts, negativity and limited-thinking employees or friends/family to move forward. As leaders of ourselves or our organizations, this takes courage, patience and perseverance.

The two tribal figures could also be viewed as the two foundational emotions of fear and love, with fear of moving into something new, uncertain or unknown, and the opposite challenging “tough” love that asks, “Why not move forward; what are you afraid of?” This internal and external questioning can be agonizing for some, but necessary to attain commitment and conviction that moving forward into uncharted territory is a necessity, a requirement to thrive. Those tormenters will be present throughout the journey, so we must be clear and strong in our response and actions.

Stage 5: Open Space

Suddenly, the vertical line of Awareness just stops, leaving an open space, before the next image appears in the sand drawing. We are left with an open gap and two tribal figures, the Tormenters, doubting our ability to move forward. Human frailty and staying stuck are at a premium at this stage.

What is the purpose of this open space on the Pollen Path?

At different stages on the journey to transformation, there will be times of great uncertainty and questioning. With awareness that the past or status quo no longer works, and questioning that leads to greater conviction and commitment to move forward, there comes open space moments that require a “leap of faith” to jump ahead without the safety net of certainty.

The leader’s vision and commitment must be highly visible here to assist others to take the leap of faith. Without the leader’s belief and conviction, the fear and doubt of others will overpower momentum and the entity will not move forward successfully.

In organizations, there are different times for different leaders. The need for transformation or major change requires a strong-willed, strong two-way listener and communicator in its leader.

The holistic dynamics of the leader’s role during times of transformation is most profound at the moment Tormenters attempt to sabotage change due to their own fear of the unknown or the potential for new work requirements and expectations as a result of change. The leader must clearly communicate the reason change is necessary and actively demonstrate conviction to support those in charge of paving the path for the new era.

During this open space of taking a “leap of faith”, the leader is communicating with different stakeholders in appropriate methods, whether that is electronically, multi-media or face-to-face. It is a repeated message, with high visibility, energy and importance, in order to build followers and momentum to take a leap of faith together.

Stage 6. Crossing the Threshold to Liminal Space

The open gap is followed by a threshold that is the entrance to the next large phase. This threshold is where commitment and action come together after taking the leap

of faith. Beyond the threshold will be a very busy time of exploring, learning, brainstorming, converging, and reaching agreement and decisions for implementation. The busy, active exploratory time beyond the threshold is contained within a vessel called Liminal Space – the place of not knowing what is next. In the Pollen Path, Liminal Space is shown as a container, a vessel, of exploration followed by decisions and planning for action.

To cross the threshold and commit to explore and take action requires courage and determination, open-mindedness and patience, and a strong support system of committed first followers (sub-leaders), as well as, a personal support system of healthy supportive relationships and personal wellness. Some stay at the threshold for an extended period of time, until they are ready in mind, body, spirit and support system.

Stage 7. First Phase in Liminal Space - Exploration

The commitment to go forward and explore has been made, without knowing what is next or what the final end destination will be. You are not back there living and accepting status quo, nor have you moved into a desired state of what is possible.

Upon entry to Liminal Space, there may be lingering feelings of a symbolic death, of letting go of old expectations, habits and results, especially for experiences of long duration.

Leaders need the right team assembled, those who view change as opportunity and excitement for personal and professional growth. They are open to possibilities and can support decisions that have considered options, resources and goals, i.e. they are assertive and visionary team players. While the team may not be comprised 100% of this individual type, due to positions or politics, the leader must emphasize that these attributes of positive outlook and open-mindedness are critical to the optimal next phase for the organization.

The Navajo ritual within The Pollen Path identifies this first part of Liminal Space as Rainbow. **The Rainbow phase** is drawn as a sideways rainbow, moving up the cornstalk, and encompasses early exploration, data collection and envisioning the future without judgment or action. Individuals are exploring possibilities and collecting “everything under the rainbow.”

The initial entry into Liminal Space may feel as if separated from normal activity and expectations. Individuals may ask, “What am I doing?” They may feel more vulnerable as Rainbow phase can be highly charged, with deeper introspection and impressions, knowing that exploration into uncharted options and possibilities can lead to a radical change or difference. It can also be highly charged with excitement – an energetic time to creatively brainstorm, research, play and use the opposite side of the brain you normally use. (Left - structured and linear. Right - unstructured and organic.)

It is helpful to connect like-minded people during the exploratory phase, where a new supportive bond is formed, sharing right away, free of immediate threats and consequences and understanding the purpose of each phase. A different place to work or meet creates a physical setting that inspires new neural pathways, creativity, and experiencing what “different” feels like. A healthy like-minded team that can challenge constructively and work in harmony eases the fear of the unknown and can enhance learning and application of new insights.

Note that some individuals can become perpetual students or explorers, not wanting to stop, converge, recommend or implement actions. The risk is paralysis through exploration. At some point, the leader may have to say: Enough. It is time to review, reflect and discuss. Exploration can always continue at some level, but decisions and actions are necessary for movement forward to fruition.

Stage 8: Guides through Liminal Space

Within the vessel of Liminal Space in the Navajo sand drawing, there are two tribal figures, one on each side of the center cornstalk. They represent **Masculine and Feminine guides** during the journey of exploration and transformation. The feminine is an agent of intuition, sensory exploration and feelings. The masculine is assertive probing with questions and inquiry, practicality and logic. Both are necessary in a transformative journey. Both are part of every human, although most individuals behave with a dominant trait of either organic, holistic, creative vision - the Feminine tribal figure, and right-brain dominant, or with structure, linear, sequential thought – the Masculine tribal figure, and left-brain dominant.

For teams, both traits from masculine and feminine are needed and bring balance to the inquiry, decisions and actions of the team.

Effective leaders understand and value the importance of both types of inquiry and expression, appealing to different kinds of audiences and stakeholders, and making decisions and plans that account for the whole system of emotions, positive experiences, sequence and agile structures. The organization is a whole system benefiting from a balance of instincts, feelings and analytical study, and the individual is a whole system, as well.

Stage 9: The “Aha” Moment

At some moment of introspection or discussion, all the learning from exploration will converge and the vision will become clear in a creative, connective, “aha” moment. The Pollen Path symbolizes this convergence with the end of the Rainbow touching a vertical lightning bolt. A sizzle of new energy is set-off at that moment. The energy has shifted, transformation now has an opportunity to take hold. It is likely that a new worldview is adopted, which gives new meaning to one’s purpose and path.

In both personal and organizational journeys, there is a tendency to try to rush to the “aha” moment. This moment should not conclude with a forced “settling” for an option. The “aha” should feel clear in its choice, obvious and inspiring. It may take longer or shorter than expected. Let the “aha” arrive, generate a buzz of energy and be celebrated.

Stage 10: Lightning Bolt of Energy

The Pollen Path shows the converging moment of “aha”, then a vertical lightning bolt, with the latter interpreted as the time and energy needed to take the highly charged excitement of an “aha”, or new vision, and make plans for implementation before reintegrating into life, the workplace, or the market environment of the organization. We do not go immediately from “aha” to reintegration. We need to make plans and the energy will be highly charged to move forward following the “aha.”

Stage 11: Exit Liminal Space

We have a vision at “aha” and we begin to plan and prepare through the Lightning Bolt phase. We now know what is next. It is time to exit Liminal Space, the vessel of exploration and not knowing what is next. The current journey is on its way. The Pollen Path symbolizes this at the top exit of the vessel with the flowering of the corn stalk symbolizing fruition and completion of the journey, and a bird’s flight, as it returns to the community with new direction and roles.

Stage 12: Reintegration

The Pollen Path ends at the top of the sand drawing with a horizontal line extending from the flowering corn stalk and bird's flight. This line is the line of Reintegration. You are reintegrating into your family, community, workplace or industry marketplace in a new form, with new energy, new references and self-image, and are highly charged to move forward. Sometimes the change is so dramatic, one is unrecognizable to family, associates or competitors. A new world view, and your role in it becomes clearer.

What Happens Next?

The person or organization continues to grow and accomplish new goals. At some point, there will be new issues and the process begins again, as we live in perpetual self-renewal. This ongoing cycle can be disruptive to those around the person or within the organization undergoing self-renewal, as it may appear that there are few stable goals or conditions. Long-term employees or long-standing friends/family may comment about this cycle. It is important to remember that we live in a dynamic environment, where growth and change result in an evolving spiral of fruition.

The good news is that once a person or entity has successfully gone through the transformative cycle and reflected on each stage, they become aware of the importance and existence of each stage. Future entry into the Pollen Path is met with less fear, quicker letting go of the past, and focused exploration with even greater growth results. And so the cycle continues.

Plan for Opportunity

Leaders can be prepared to respond at each stage. The timing for when a transition to the next stage will occur is unpredictable. However, with awareness, support, and preparation, the transformative cycle can be healthier and accelerated. For example, the following stages may involve these various actions:

1. **In Chaos/ Crisis:** Conduct an offsite meeting to assess the situation in a relaxed, non-threatening environment. The purpose is to create awareness and encourage honest sharing, ideally with a trained facilitator who delves safely into, “What is really going on?”
2. **Expand Awareness:** Ask different teams to explore the cause of chaos and future possibilities, ask, “What do we need to know or understand? What are ideas to explore?” By involving different and more individuals, you obtain more buy-in, commitment and support for the transformative journey.
3. **Crossing the Threshold:** Acknowledge the process, what you are about to do, the team members involved, and, be a positive leader communicating opportunity, improvement, professional growth and organizational success.
4. **In Liminal Space:** Initiate a process that begins with surveys, research, focus groups, scanning the environment and open dialogue. Then utilize the data and begin an inclusive Strategic Planning process, to crystallize the vision, goals and tactics, obtaining buy-in along the way.
5. **Reentry:** Be clear and focused with Strategic and Marketing Implementation Plans. Know your desired image and promote it. Have clear goals with communication, measurement and accountability.

Commitment

As the leader, your commitment, understanding of the process and inspiring communication to support all efforts, are critical to the transformational path. A quote from Maslow: “The drive for transformation is the desire to become everything that one is capable of becoming.”

Thank you for learning about the Pollen Path. Best wishes for a truly transformational journey ahead.

Nancy

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Hope Leadership for a Global Community

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Abstract

When leaders extend their organizational perspectives beyond isolated, ethnocentric paradigms, they move into the uncertainty of encountering diverse value systems, rules of social engagement, individualism/collectivism, political and economic dynamics, and business practices across a global community. This journey into ambiguity presents many challenges, including how to proactively anticipate and engage differences through creativity, flexibility and resilience. Hope Leadership presents a model for successfully anticipating potential challenges within unfamiliar territory, exploring multiple avenues for innovative goal achievement, and developing creative, flexible, and resilient business practices that promote global business success.

Keywords: leadership, global, hope, flexibility, agility, creativity, ambiguity.

Leadership within a global community presents us with numerous challenges. Some of these include international events and crises, rapid technological change, political change, as well as the growing complexity of both existing and emerging barriers (Thorn, 2012). Yukl and Mahsud (2010) proposed a number of additional obstacles. These include an increase in the number of global business locations, virtual project management, and diverse cultural values. Add to this mix a multinational company collaborating with businesses from different geographical regions to design, manufacture and deliver one or more products, and you have a recipe for communication and business etiquette disaster (Okoro, 2012). In the event a global company achieves success, it may not survive by virtue of relying on obsolete business practices. The decline in Japan's global success resulted from the use of what once led to significant achievements both at home and as exporters. The previous efficacious business practices proved to be detrimental to the successful relocation of Japanese companies in other parts of the world (Black & Morrison, 2012).

Considering the aforementioned trends, leadership must be more agile and able to quickly adapt to changing global politics, economics, markets, and cultural shifts (e.g., movement of labor from declining countries to those providing new opportunities). Conducting business from an ethnocentric perspective using outdated leadership and management practices guarantees failure in the global arena. This paper proposes Hope Leadership as a framework for viewing the changing world as a place of both ambiguity and opportunity.

Hope Leadership

According to Luthans and Avolio (2005), "the force multiplier throughout history has often been attributed to the leader's ability to generate hope" (p. 42). Hope Leadership is grounded in the work of C.R. Snyder's (2003) approach to defining and measuring hope. Both Snyder and Lopez (2014) take hope beyond wishful thinking. Hope has three essential components. The first is having a clear goal; hope is focused on a specific outcome. The second component is pathways thinking and the third is agency thinking. Pathways thinking refers to our perceived capacity to anticipate the need for,

and the discovery/creation of, multiple routes to our goals. Pathways thinking is related to creating alternate routes when our original ones are blocked. Moreover, pathways thinking helps us anticipate potential barriers and accurately respond by developing multiple plans for overcoming the barriers. In this sense, it surpasses wishful thinking through the power of contingency planning. Hope is also related to a belief that we will find or create a route toward goal attainment. Agency thinking refers to our capacity for finding, creating, and using alternate routes; in this sense agency represents a strong sense of self-efficacy. Agency is demonstrated at the highest level through perseverance and resilience. If one pathway fails, we find another. If there are no available pathways, we create one. If we fail along the way, we refuse to give up and continue adjusting our progress toward reaching our goals. There may be many course corrections along the way. However, this is to be expected and is by no means a legitimate excuse to give up.

In addition to pathways and agency thinking, hope leadership is guided by transformational leadership theory. Transformational leadership (Bennis & Nanus, 1985) amplifies the importance of having a clear vision, changing the organizational culture via social architecture, establishing trust, and positive self-regard. Kouzes and Posner (2002) developed another model of transformational leadership that emphasized the importance of leading by example, inspiring a shared vision, challenging the process, enabling others to act, and encouraging the heart. Hope and transformational leadership work in concert toward generating a positive impact on successful global leadership. This will be demonstrated in the Hope Leadership Model (see Figure 1).

Hope Leadership is defined as the capacity to facilitate organizational success by using hope theory and transformational leadership to build an organization's capacity for creativity, flexibility, and resilience leading to accurate, rapid, and creative responses to global change.

The term “facilitate” conveys the importance of a collaborative leadership approach, where the leader takes on an inspirational and guiding demeanor. Engineering the capacity for accurate, rapid, and creative responses entails the implementation of specific strategies for crafting an incubator for positive adaptation to a changing environment.

Furthermore, the transformational influence of Snyder's hope theory presents promising possibilities for an organization immersed in high levels of pathways and agency thinking. The Hope Leadership Model (Figure 1) illustrates seven propositions regarding the process of how hope leadership exerts a positive influence on successful global leadership.

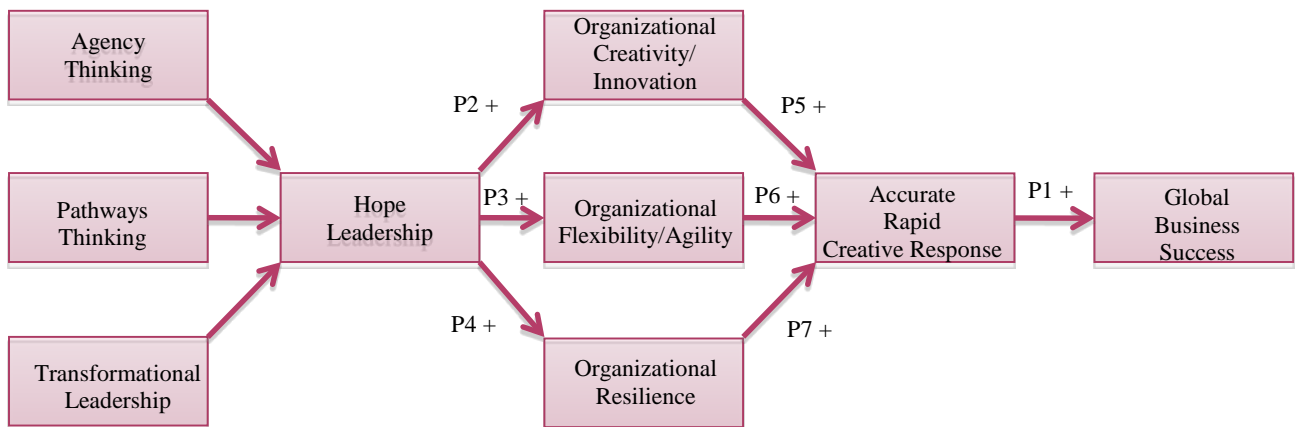


Figure 1. Hope Leadership Model. Arrows depict direction of contribution. P stands for Proposition and the + symbol designates a positive influence. Numbers represent one of the seven propositions.

Accurate, rapid, creative response

In an environment of unprecedented fast and furious change, leaders who are skilled in engendering accurate, rapid, and creative responses to business climate variations blaze a trail toward organizational triumph. Organizations that did not

successfully adapt to the influx of global influence were soon left behind, memorialized in the hall of obsolescence.

The ability to create an organizational culture that promotes ingenuity and an accurate, rapid response to emerging markets, is a skill set consistent with a more collaborative leadership approach. When leaders build vital partnerships by promoting an employee's sense of autonomy, mastery and purpose, they effectively motivate followers (Pink, 2011). The positivity of a working environment where one is encouraged to maximize talent creates an incubator for creative thinking and enhanced problem-solving (Fredrickson, 2009). The W. L. Gore Company is designed for cultivating creativity, flexibility, and organizational resilience. Gore offers over 1000 products, with approximately \$3 billion in revenues (Hamel, 2007, 2010). Their products include Glide dental floss, artificial blood vessels, heart strings, Elixir guitar strings, and Gore-Tex fabrics for firefighters, astronauts and soldiers. The company is built on entrepreneurial innovation. Gore's organizational structure is as flexible as its artificial blood vessels; they are a flat organization with a lattice structure, allowing movement across multiple projects. They are also a company that refuses to quit. Their resilience in promoting Glide dental floss is remarkable. After 20 years of pitching its Glide to multiple companies, they brought it to the marketplace and gave free samples to dentists and hygienists; they experienced success through viral marketing. In the case of Elixir guitar strings, the Gore "string team" worked three years before they developed a superior guitar string, one that outsells the competition two to one.

On the other hand, a rigid organizational environment with its inherently slow and/or inaccurate response strategies, arrogant and/or ignorant entrenchment accompanied by ineffective practices, blended with a general lack of ingenuity, formulates a lethal cocktail ensuring competitive insignificance and demise. In Sull's (1999) case study of Firestone, he identifies inaccurate response actions as the cause for its decline. Sull proposed a dynamic of failure evidenced in the Firestone Tire Company. The dynamic of failure includes blinders to destructive assumptions, routines that resist healthy changes, old relationships that tie the company down, and outdated values that reinforce rigid corporate culture. Slow response time was not a factor in the Firestone

failure. As a matter of fact, Firestone responded to the market threat of Michelin's innovative radial tires in a timely fashion. However, they continued to use their "tried and true" manufacturing processes that did not ensure the higher quality standards necessary for radial tires. The executives at Firestone assumed their manufacturing processes were superior and would prove efficacious for radial tires. They also maintained old, unproductive relationships with dealers and failed to develop new relationships in the emerging markets. Finally, their rigid organizational culture left little room for flexibility and innovation. After seven decades of growth, Firestone lost its market share; Bridgestone acquired Firestone in 1979.

Proposition 1: Organizational environments that foster accurate, rapid, and creative responses to shifting global dynamics have a positive influence on global business success.

Hope Leadership and Creativity

Organizational creativity is necessary for innovation, especially in volatile business environments (James, Brodersen, & Eisenberg, 2004). Rego, Machado, Leal and Cunha (2009) defined creativity in the workplace as "...the production of novel and useful ideas or solutions concerning products, services, processes, and procedures" (p. 223). This definition of creativity has strong connections with several components of hope leadership.

Hope leadership is built upon pathways thinking, agency thinking, and transformational leadership. Regarding the power of pathways thinking, leaders who set an expectation for the development of multiple routes to goal attainment nurture a creative corporate culture where all members of an organization engage in anticipating barriers and designing novel solutions (i.e., pathways). Designing multiple routes reinforces creative thinking, along with the freedom to generate diverse ideas, both those that never work and the next brilliant idea.

Agency thinking amplifies the strength of an individual's capacity to achieve significant results. Leaders who promote agency thinking acknowledge the value and

potential of employees, enhance their self-efficacy and promote the development of one of creativity's key components: a belief that one has the ability to innovate and add value to the organization. Once company employees have a sense of agency, they internalize a belief that they are capable and empowered to transform an organization through the gift of novel ideas. Consequently, creativity has a firm foundation for launching innovative processes, procedures, products and services.

Transformational leadership cultivates creativity via its emphasis on developing trust. On the other hand, creativity is muted in a punitive work environment (Fredrickson, 2009). Moreover, as transformational leaders use the creative deployment of self, they help followers become more confident. As a result, followers experience a stronger sense of self-confidence, self-efficacy, and the empowerment necessary for creative endeavors.

The Cirque du Soleil is Canada's paragon of creativity (Leslie & Rantisi, 2011). Their innovative circus hybrid, with no animals and the integration of post-modern art form, along with elements of dance, theatre and television caught the world by surprise at a time when traditional circuses declined. Cirque began with a group of street performers who loved taking risks and breaking new ground; they demonstrated a high level of pathways thinking by creating new routes for a fresh, breathtaking entertainment experience. Moreover, their confidence and self-efficacy for making dreams come true launched them into a worldwide phenomenon. Finally, the very nature of Cirque demonstrates the fresh vision and a culture of trust (i.e., personal safety depends on teamwork), which parallels transformational leadership's emphasis on the aforementioned elements.

Proposition 2: Hope Leadership has a positive influence on organizational creativity.

Hope Leadership and Flexibility/Agility

Eapen (2010) described flexibility as "... an attribute that allows companies to manage through uncertainty" (p. 15). Bernardes and Hanna (2009) defined flexibility as the "inherent property of systems which allows them to change within pre-established parameters" (p. 30). They also made a distinction between flexibility and agility; agility

supports rapid system reconfiguration as an effective response to unforeseeable change. Both flexibility and agility are necessary for promoting adaptive responses to change.

How might Hope Leadership positively influence organizational flexibility and agility? The pathways thinking component of Hope Leadership exerts a strong influence on flexibility and agility. That is, when organizations seek to find and/or create new pathways toward goal attainment, this creates an environment where leaders understand the necessity of changing systems and processes within given parameters, and the incentive to reconfigure systems to accommodate the new routes. Crayola is the paragon of flexibility. They began with a mission to nurture children's creativity. Since 1885, Crayola continued to develop innovative products for new generations. Leadership held fast to their mission and innovated products through flexible business practice while working within the parameters of their central purpose.

What is the relationship between hope leadership and agility? Pathways thinking fosters the evolution of an organic organizational system for building new routes toward goal achievement in a manner similar to the brain's complex creation of neural networks. In pathways thinking, options are explored for moving past obstacles; this may include system reconfiguration. W. L. Gore Company demonstrates agility in its organic structure. Their lattice system quickly adapts to a changing environment since it does not require moving through a chain of command. Moreover, new project teams surface to accommodate specific projects. For example, a team formed at Gore to work on Elixir guitar strings. Gore's organic system brought the best blend of associates into the project based on their levels of expertise, much like the human body's response to changing environmental conditions.

Proposition 3: Hope Leadership has a positive influence on organizational flexibility and agility.

Hope Leadership and Organizational Resilience

Child psychologists initiated the study of resilience in response to children adversely affected by crises in an effort to gain a better understanding of why some

children recover and others experience great difficulty (Holling & Gunderson, 2002). Organizational studies applied resilience theory to the study of how groups could move beyond disasters and uncertain environments (Kantur & Iseri-Say, 2012). Organizational resilience, according to Horne and Orr (1998), is defined as a quality demonstrated by a system's ability to respond productively to the impact of significant change that disrupts our sense of a predictable environment. Coutu (2002) added to this definition by including the capacity to take a positive outlook on making sense of "reality" and then creating or improvising solutions. Therefore, resilience is a proactive, positive response to negative events.

Hope leadership exerts a positive influence on an organization's resilience through pathways thinking, agency, and transformational leadership's emphasis on vision. Pathways thinking is a form of building strong organizational immune systems. That is, through pathway thinking, leaders expect and anticipate problems and the fallout from slamming into barriers to desired goals. It is in this realistic expectation that an organization possesses a mindset for not giving up after encountering one or more roadblocks. Moreover, creating multiple routes provides a sense of hope and direction inherent in the freedom associated with exploring diverse options. Regarding how hope leadership activates resilience, the agency component is germane to empowering perseverance. More specifically, agency empowers an individual with a sense of having the capacity to make things happen. Agency refers to leaders being an agent of the future; leaders have the power to change themselves and their organizations. We possess the ability/talents sufficient for persisting until we succeed. Finally, transformational leadership's vision component offers the power of a compelling image worthy of the sweat and tears necessary for success.

The Hyundai Motor Company is a study in resilience (Wright, Suh, & Leggett, 2009). Hyundai failed twice in its attempt to establish a successful global production network. The first CAN\$382 million failure with their Greenfield plant in Canada resulted from the plants inaccessible location (e.g., it took 23 days to transport parts to the plant), employee relations problems, and inadequate knowledge of North American car markets. The plant in Canada closed in 1993. Hyundai experience a second failure in

Turkey. The venture was postponed due to Turkey's economic crisis in 1994 and Toyota Corolla's dominance in Turkey.

Hyundai's resilience resulted from a conscious decision to learn from their failures, followed by the development of new pathways for establishing successful global production networks. They established successful plants in India, China, and in the United States. Furthermore, their resilience is related to a clear, compelling vision and an unflinching sense of agency for goal attainment.

Proposition 4: Hope Leadership has a positive influence on organizational resilience.

Creativity and an Accurate, Rapid, Creative Response for Global Business Success

To be competitive in the international marketplace, companies must have the capacity to generate accurate, rapid and creative responses to unpredictable fluctuation. Organizational creativity and innovation are two factors that contribute to business success (Anderson, Potocnik, & Zhou, 2014; Kaufmann & Sternberg, 2010). Creativity's idea generation and innovation's idea implementation have become sources of distinct competitive advantage (Anderson, De Dreu, & Nijsta, 2004). Amazon is a prime example of both creativity and innovation. That is, they generate new ideas and demonstrate skillful idea implementation. These two factors contribute to their global success.

Proposition 5: Organizational creativity/innovation has a positive influence on promoting accurate, rapid and creative responses to global challenges.

Flexibility/Agility and an Accurate, Rapid, Creative Response for

Global Business Success

Eapen (2010) defined flexibility as an attribute that helps companies manage through uncertainty. For example, the Aluminum Can Company negotiated a labor contract that allowed it to increase and decrease employment according to supply and demand. This type of flexibility maximizes production efficiency. Moreover, Rogers, Ojha and White (2011) identified six types of flexibility (i.e., product mix, routing, equipment, volume, and labor); labor flexibility was one of the most important

dimensions. With increasing pressure to perform faster and more effectively, flexibility is positively correlated to workflow speed (Rogers et al., 2011).

BMW USA is a prime example of using flexibility and agility for global business success. BMW demonstrated agility by rethinking the decline of sales for the X5 in the US by expanding their North Carolina plant from using 50% capacity for meeting US demand to using 70% capacity for exports (Barkholz, 2009). Their manufacturing flexibility, along with accurate strategic planning and a rapid response, moved them beyond the struggle of some US car manufacturers working feverishly to avoid bankruptcy.

Proposition 6: Organizational flexibility/agility has a positive influence on promoting accurate, rapid and creative responses to global challenges.

Resilience and an Accurate, Rapid, Creative Response for Global Business Success

Resilience is the third element that has a positive influence on a company's international

success. According to Burnard and Bhamra (2011), it is absolutely necessary for organizations to continually adapt within uncertain environments. Over the past few decades, business disruptions included economic downturn, fluctuating market conditions, disasters, terrorism, and changes in customer demands (Sheffi, 2005).

Gunderson (2000) defined resilience as the ability of a system to return to a stable state after disruption. In the case of a business system, it is the ability to recover after unexpected events that wreak havoc within an organization. Resilience is the ability to regroup and recover. When disruptions throw an organization into disarray, the ability to respond in an accurate, rapid and creative manner is significantly impaired. Resilience is one of the key remedies for stabilizing the organization and restoring the system back to health. Resilience can help a city and a nation recover from disaster (e.g., the World Trade Center terrorist attack). Following 911, New York City, along with the rest of the United States of America, responded with rebuilding and moving forward, while honoring the memory of those lost in the attack. This is resilience at its finest.

Proposition 7: Organizational resilience has a positive influence on promoting accurate, rapid and creative responses to global challenges.

Summary

Hope leadership is defined as the capacity to facilitate organizational success by using hope theory and transformational leadership to build an organization's capacity for creativity, flexibility, and resilience, leading to accurate, rapid, and creative responses to global change. The Hope Leadership Model illustrates seven propositions regarding how hope leadership exerts a positive influence on successful global leadership. The model does not infer causation.

The Hope Leadership Model is innovative in its use of hope theory and transformational leadership as key components for successfully managing uncertainty and transforming potential global challenges into opportunities. Combining the positive psychology research on hope with transformational leadership and global business challenges integrates evidence-based hope principles with leadership and organizational success strategies.

In theory, organizations can become more creative, flexible, and resilient through hope leadership. Indeed, the extant literature on hope theory is promising and presents a rich resource for enhancing global leadership practices. Research is needed to investigate hope leadership's seven propositions and their positive influence potential.

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Moving Beyond “It Was Great:” Using Short-Term Study Abroad Programs to Prepare Students for Leadership in a Global Economy

By: Dr. Vikki Tenhaken

International study for college students has long been about broadening one's world knowledge. Increasingly, taking part in a study abroad program is also important in positioning graduates for future career success.¹ The results of a study by the Council for International Educational Exchange (CIEE, 2006) provides significant support for the belief that employers value study abroad in hiring recent college and university graduates, particularly among certain classes of employers. Research published in

¹ Though the focus of this paper is designing study abroad programs to position students for career success, the author does not mean to imply that career preparation is – or should be – the goal of all study abroad programs. There are many other worthy educational goals to be achieved through study abroad.

Frontiers: The Interdisciplinary Journal of Study Abroad on employer attitudes toward international study provides evidence that employers place value on study abroad when compared to a variety of other educational experiences (Trooboff, Vande Berg, & Rayman, 2008). The 2011 QS Global Employer Survey of over 10,000 recruiters worldwide (Molony, Sowter, & Potts, 2011) indicates that employers actively seek and give preference to college graduates who had studied abroad. Six out of ten employers said they give “extra credit” for a student’s international experience and more than 80 percent said they actively seek graduates who had studied abroad.²

What skills are these employers expecting students to gain from their international studies? They have concluded that a study abroad experience is a marker for something, but what? The findings of these studies suggest there is a connection in employers’ minds between international study and the development of certain interpersonal skills and that the development of “intercultural sensitivity” is a high priority. Today’s students must be prepared to interact with people and cultural situations that may differ significantly from their life experiences to date. Further, the multi-cultural work environment within the United States reflects a microcosm of the global community, so intercultural sensitivity not only prepares an individual for the changing global environment of the twenty-first century, it also provides skills for managing a more diverse workforce at home.

Learning Objectives for Study Abroad Programs

There are several attributes employers seek that study abroad programs can help develop (Gardner, Steglitz, & Gross, 2008). Specifically, employers see study abroad experience as demonstration of a student’s:

- Ability to work independently
- Willingness to undertake unfamiliar and/or risky tasks
- Ability to apply information in new contexts
- Skill in identifying new problems or new solutions to problems

² The QS Global Employer Survey Report 2011 sampled employers in 116 countries on five continents.

- Ability to work effectively in a stressful situation

Personal qualities valued by employers that are derived from intercultural/global educational criteria include (Trooboff et al., 2008):

- Listens and observes well
- Flexible, adapts well
- Curious, wants to discover more
- Non-judgmental toward other world views
- Willing to take risks to learn new things
- Recognizes own world view is not universal

In this same study in which employers said they value personal intercultural/global competencies, employers indicated they are not strongly convinced that study abroad enhances these skills. The onus will be on the student to translate his or her study abroad experience into a framework recognizable to employers as the skills they value...to go beyond “It was great! I had such a good time!!” Since simply going abroad does not guarantee that the skills and competencies employers are looking for were developed in an individual, students must learn to express how the study abroad experience enhanced their knowledge of and skill in working effectively in a global society. Therefore, students should be prepared to:

- Exhibit new knowledge gained from the experience
- Show their understanding of cultural differences in the workplace
- Explain how they interacted with people who held different interests, values, or perspectives
- Give examples of how they adapted to challenging situations

Intercultural sensitivity has long been recognized as a necessary skill for effective intercultural competence (Bhawuk & Brislin, 1992; Cushner, 1989). However, recognizing cultural differences is only the first step toward achieving success in international business situations. To develop the intercultural sensitivity needed for global interactions, one must learn to understand, respect, and appreciate both surface and deep-level cultural differences and then also be able to adapt one’s own behavior as appropriate.

Developing the intercultural competence necessary to work effectively in a global environment includes three different domains of learning: cognition, affect, and behavior (Bhawuk & Sakuda, 2009)

- Cognition involves recognizing cultural differences and is the first step in gaining new knowledge about other cultures.
- The second step in gaining intercultural sensitivity involves positive emotional responses to cultural differences, exhibiting understanding and acceptance of those differences. Many people express an interest in experiencing other cultures, but their interest often wanes when confronted with the realities of intercultural adversity. Inter-culturally sensitive individuals develop the ability to persist, despite setbacks and misunderstandings. Those with low intercultural sensitivity instinctively recoil from differences that challenge their core values and beliefs, while those with high intercultural sensitivity refrain from reflexive judgment and seek to learn more about the underlying causes of the cultural difference.
- After cognitive recognition and affective acceptance of a cultural difference, one must still be able to formulate a culturally appropriate response. So the third step in becoming inter-culturally sensitive involves behavior: the ability to adapt to challenging situations. To emphasize the importance (and perhaps the difficulty) of moving from knowing about something to actually being able to do something with that knowledge, some refer to this step as a separate capability, that of “cultural intelligence” (Peterson, 2004; Thomas & Inkson, 2009).

Experiential learning is defined as the process whereby knowledge is created through the transformation of experience (Kolb, 1984). To make students’ international study a true experiential learning opportunity, study abroad professionals and faculty members leading these programs should pay attention to the desired learning outcomes in designing study abroad programs for students. The educational goals that can lead to the marketable skill of intercultural sensitivity, therefore, should include (Sachau, Brasher, & Fee, 2010):

1. increasing knowledge of other cultures³
2. shaping an attitude of open-mindedness, and
3. building flexibility and confidence to appropriately adapt to new and different situations

Study abroad programs can play a major role in accomplishing these three goals of intercultural competence (Salisbury, 2011). Noted management author Peter Senge says in his work on developing learning organizations that true learning doesn't take place until behavior changes (Senge, 1990). Therefore, simply gaining knowledge about other cultures (Step 1 above) is not enough to achieve the desired learning outcomes. Kurt Lewin's theory of change management teaches us that the first step in bringing about true and lasting change in behavior is to "unfreeze" current, comfortable behaviors. This cannot happen by simply reading about and studying another culture in the classroom. The disorientation that enables the "unfreezing" of one's current approach to everyday situations, including problem-solving, happens when students experience living and working in another culture.

Study abroad programs should involve academic work that increases students' knowledge of other cultures, but to achieve all three intercultural sensitivity educational goals they must also include experiences that require students to exercise open-mindedness and flexibility in adapting to new and different – often challenging – situations. Particularly challenging for students – as well as for seasoned managers – is recognizing when it is *not* appropriate to make concessions in adapting behavior and how to explain one's position without giving offense. Such situations require true intercultural intelligence.

Short-Term Study Abroad Programs Ability to Achieve Learning Objectives

The term "international experience" was not defined in the QS Employers' Survey that indicated preference for applicants who had participated in a study abroad

³ Knowledge goals may also include specific educational themes, such as the transition from socialism to a free market economy, the role of the EU, or differences in operating a joint venture vs. a wholly-owned foreign enterprise in China.

program. Traditionally, a study abroad experience was understood to be a semester or year of study at a university outside the home country. In the Trooboff, Vande Berg, and Rayman study, responding employers showed two significant preferences for study abroad experiences: the longer the program, the more value it had; and they placed relatively higher value on experiential learning – programs that feature internships or service learning opportunities.⁴ Increasingly, however, students in the United States appear to prefer short-term study abroad experiences of eight weeks or less. According to the Institute of International Education’s 2012 Open Doors report, more than half (58.1 percent) of all American students who studied abroad in the 2010/11 academic year participated in short-term programs. This statistic is especially notable because it is a relatively new phenomenon: During the 1996/97 academic year, only 3.3 percent of students studying abroad participated in short-term programs.

If short-term study abroad programs continue to be preferred by students, how are we as faculty members and international education administrators to design these programs to accomplish the educational goals for developing intercultural sensitivity? Too often short-term programs are seen as “travel and tour” experiences that students enjoy (the “it was great” phenomenon) but do little to develop the intercultural sensitivity skills desired by future employers. Short-term programs, even those with advance academic work to learn about the culture(s) being visited, seldom go beyond the first step of intercultural sensitivity, that of increasing knowledge of other cultures. Though short-term programs can accomplish some level of open-mindedness, they often accomplish little in the area of actual behavior change. Because of the “island” or “bubble” syndrome⁵ of many short-term study abroad programs, students are often not faced with challenging interpersonal situations or the need to adapt their behavior.

Since the value employers place on study abroad grows significantly as program length increases (Trooboff et al., 2008), students who have participated in short-term

⁴ The most valued study abroad program by employers responding to this study was a semester-long internship.

⁵ The island or bubble syndrome results when students from the home institution travel together in a group, stay in hotels and go from site to site - often on a chartered bus - seldom interacting one-on-one with people from the host country.

programs will need to be able to describe their experience in ways that will convince prospective employers that their time abroad has prepared them in other ways. It is especially important that faculty members leading short-term study abroad programs design them to include exercises (journaling, group discussions, etc.) that encourage students to articulate how their study abroad experience has affected the areas of personal growth. Students should begin to express not only their developing knowledge of another culture, but also how their experiences have led to intercultural open-mindedness and flexibility. Since employers also show a strong preference for study abroad programs that feature service learning or internships, the design of a short-term program should seek to provide students with well-structured opportunities to do meaningful work while abroad.

There is a growing body of knowledge around best practices for short-term study abroad programs (Donnelly-Smith, 2009; Mills, Deviney, & Ball, 2010; Douglas & Jones-Ridders, 2008; Sachau et al., 2010; Smith, 2002; Vander Broek, Selezneva, Veiga, Bloem, & TenHaken, 2013). Suggested practices gleaned from these studies and others include:

- Structure a pre-departure curriculum with strong academic content as well as learning about the culture of the program's host country.
 - It is best to require readings be completed before the program begins, especially for programs on the shorter end of the spectrum.
 - One technique used to achieve the educational goal of cultural knowledge is to have students perform a “culture scan”⁶ at three different points: before they travel, while they are in the host country, and also when they return. This technique sensitizes students to subtle differences between cultures they might not otherwise recognize.
 - In addition to cultural learning and necessary logistical travel information these pre-departure sessions should contain academic content appropriate

⁶ One such cultural scanning technique was developed by Phillips and Boyacigiller (2004) as a tool to examine the dimensions along which cultures differ. Students assess a culture in the seven categories of Free Will, Sources of Truth, Time, Human nature, Relationships, Purpose of Work, and Communications.

to the course's other educational goals. This can create an issue for both faculty members and students when home institutions do not assign credit for work that takes place during the term preceding the short-term session. Though the ideal solution may be to make the pre-departure curriculum a one-credit course, this issue could also be addressed by adjusting the credits earned for the program itself beyond what the time abroad would indicate. For instance, if your school's normal off-campus May Term courses are assigned four credits for four weeks abroad, the program could be designed with the equivalent of one credit of coursework in the term prior to departure and the study abroad program could either be adjusted to earn five credits or stay at four credits but run for just three weeks.

- Select faculty members to accompany the students who are competent in experiential teaching and who can integrate knowledge of the unique features of the site abroad to ensure students make connections and have authentic learning experiences.
 - If the faculty member does not have in-depth knowledge of the history and culture of the historical/cultural sites, a guide should be hired to focus students' attention on important educational learning aspects.
 - Faculty should be trained or experienced in guided reflective group discussion as well as in directed, critical-thinking journaling.
- Pack the itinerary. For very short programs, it may be possible to fit in three modules per day. Try to do at least one historical/cultural activity and one course-related activity each day. Give students the opportunity for input on activities before the program begins and, if possible, have students plan some of the modules.
- Ensure interaction with local people. Students should not simply go from hotel to site visits with their group on a chartered bus. Even though short-term programs provide only brief exposure to the values, beliefs, and behaviors of people in the

host country, there are ways to facilitate meaningful contact. Integrate one or more of the following into your program:

- have students live on a college or university campus in the host country
 - integrate a “home stay” with local families
 - pair students with “buddies” or mentors from the host country
 - engage local students who want to practice their English as translators
 - plan stops in small towns less visited by tourists
 - arrange for participation in local, traditional, social activities
 - have students conduct in-depth interviews (45-60 minutes) with local people on a research question related to the academic content of the program
- Do not do everything as a group or make all arrangements for the students. To accomplish the intercultural educational goals in a short-term program, students must explore and figure things out on their own, or at least in small groups. Building flexibility and confidence in their ability to adapt to new and challenging situations cannot be accomplished if students are not expected to develop their own navigation skills or if they never have to interact independently with people in the host country. Students should finish the trip confident in their ability to engage another culture on their own in the future.
 - Whenever possible, build in some days for independent or small group exploration.
 - Partner with a host country university. Findings in a recent well-researched study (Stebbleton, Soria, & Cherney, 2013) indicate that studying abroad through other colleges and universities is associated with higher increases in global and intercultural competencies than studying abroad through the home institution.
 - Set up lectures with professors from the host country institution.
 - Invite students from the university in the host country to participate in your courses and field trips.

- Use social networking tools to facilitate online exchanges with students in the host country. These not only help students get to know each other, but can be used to maintain relationships after the program has ended.
- Include a field placement, internship, job-shadowing, or service learning component in the time abroad. However brief, it is important to have an experiential component that puts students in contact with the everyday working world of the host community.
 - Pre-planned structure of such an experience is necessary for students to fully benefit from a work-learning opportunity: Program directors should be deliberate about identifying what they want students to learn from the interaction as well as how the work-learning experience will enhance the overall academic value of the program.
 - Arrange for students to follow up their participation in short-term programs (particularly those of four weeks or less) with an internship. A week or two of such independent experiential learning in the country can be an invaluable contribution to the student's learning.
- Food and beverages can provide important links to a culture. It has been said that food reflects the true history of a place,⁷ so use meal times and cultural visits to explore this aspect of cultural learning.
 - Communal meals, cooking classes, visits to grocery stores, farmers markets – any opportunity where students have the opportunity to interact with chefs, growers, and food processors can help them understand the historical and contemporary importance of food traditions.
 - Understanding the cultural impact of food will also provide insights into the potential clash between globalization and local customs.
- Require ongoing reflection by individual students and the group as a whole. Experience integrated with rigorous critical thinking will help students learn more

⁷ For instance, *Gastronomica: The Journal of Food and Culture* from the University of California Press describes its mission as “using food as an important source of knowledge about different cultures and societies, provoking discussion and encouraging thoughtful reflection on the history, literature, representation, and cultural impact of food.”

holistically as well as prepare them to talk about their experience in specific terms.

- Students should keep structured journals of their study abroad experience, using guided reflection practices to help them process and understand their experiences.
- The group should regularly engage in “debriefing” discussions about the learning garnered from the day’s experiences.
- Whenever possible include return activities involving both individual and group reflection.
 - Requiring individual papers to be submitted within a month after the short-term study abroad experience provides the discipline for students to reflect on their learning in a deliberate, academic manner.
 - Scheduled student sessions with the school’s career services office regarding how to describe their study abroad experience in terms of the learning outcomes employers value can be particularly helpful.
 - Social media can enable students to keep in touch with their study group even when they are not returning to the home campus.

Discussion

It is the thesis of this author that a well-designed short-term study abroad program can accomplish the intercultural sensitivity and global educational goals desired by employers. It may even be possible to develop greater intercultural sensitivity through multiple short-term study abroad programs than through a single, longer-term study abroad experience. In a semester- or year-long program in one country, a student needs to develop the skills to adjust to that particular culture. If the educational objective of studying abroad is mainly one of acquiring language skills, then longer term programs are likely still the best option. However, English is widely considered the international language of business (Neely, 2012) and in most global businesses today, managers are required to work with people from many different cultures. Therefore, it is possible that taking part in more than one short-term study abroad program to experience different cultures might actually better prepare students in developing the skills employers seek.

However, if we want students to develop true intercultural intelligence through participation in short-term study abroad programs, care must be taken to specifically design these programs to achieve the global educational goals of intercultural sensitivity.

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Perceptions of The Independent School Leader in California: Global Issues

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Abstract

Many independent schools define themselves as the most innovative primary and secondary educational institutions in the country. The National Association of Independent Schools believes that a critical ingredient for school health is strong leadership. At most independent schools, there is no formal requirement or accreditation needed by those who lead them, nor is there a typical path that one may go through to take on the role of head of school. Heads of schools may be former teachers or administrators from diverse areas of school experiences and backgrounds, ranging from academic administration and student service areas to admissions and development. Others who are heads of schools have taken a path external from independent schools, coming from higher education or even the corporate world. Regardless of their paths to becoming head of school, the most significant challenge faced by the leaders of independent schools is whether or not they possess the leadership skills necessary to meet the variety of problems associated with leading independent schools. Using preliminary data collected through a web-based questionnaire, this paper explores the perceptions and attitudes of independent school heads at primary, secondary, boarding, and day schools in California. The sample comprised 11 independent schools of varying grade compositions — one K-8, three K-12, two 6-12, one 7-12, and four 9-12. Five of the schools are strictly day schools and the other seven are boarding schools that also have a population of day students in attendance. The study found that skills related to maintaining relationships among key constituencies, areas of finance including sustainability and financial aid, and enrollment of a diverse and appropriate student body were perceived as being the most important skills for effective independent school leadership. Future research could include a larger sample, as this was a preliminary collection of data.

Perceptions of Independent School Leaders in California on Current Challenges: Leadership Skills to Meet Those Challenges

The National Association of Independent Schools (NAIS) defines independent schools as follows: “Independent schools are non-profit private schools that are self-determining in mission and program. They are governed by independent boards and are funded primarily through tuition, charitable contributions, and endowment income” (NAIS, 2012b, ¶ 2). This independence in mission and program is accredited by local accrediting agencies. For example, independent schools in California are accredited by the Western Association of Schools and Colleges (WASC) and the California Association of Independent Schools (CAIS).

Because of their autonomy and unique structures, the leadership skills that independent school heads possess are paramount for these institutions to be successful. Independent schools are by their nature “innovative,” as described by one of the top business thinkers in the world, Daniel Pink, because they meet his criteria of autonomy, mastery, and purpose (Pink, 2009). Independent schools have complete freedom and independence, both in their programmatic and financial decisions. These schools all have unique missions that identify both what they are and what they hope to become. They are pushed to improve by increased competition in this industry. The multifaceted task of leading these institutions dictates that,

School heads are responsible for curriculum, instruction, and professional development to be sure, but that is just the beginning. They are also routinely involved in issues of finance, buildings and grounds, diversity, athletics, health and safety, financial aid, marketing, development, supervision, community outreach, legal matters and human resources. (Hoerr, 2009, pp. 5-6)

Of further note, the independent school market faces an economy that is recovering at a slower rate than expected, and all the while, “the cost of education is increasing and families are evaluating their spending and saving priorities” (National

Association of Independent Schools (NAIS, 2012a, p. 2). This could likely result in fewer families choosing to enroll their children in an independent school.

Heads of schools have many complex responsibilities and are ultimately responsible for the growth, change, innovation, and financial viability of the schools they lead. To this end, heads of schools perceptions and attitudes towards current leadership challenges, and possible strategies to solve these problems, is critical to continued growth in the area of education at independent schools in the United States. NAIS (2010) explains that the primary responsibility of the head of school is to, “carry out the school's stated mission” (§ 2). While there are profoundly different ways to accomplish this goal, NAIS offers principles as guideposts, “for all heads engaged in this rewarding, complex job” (NAIS, 2010, § 2). A recent MetLife survey reported that “the top leadership challenge reported by [78% of] principals and [86% of] teachers was managing the budget and resources to meet their schools' needs” (Torres, 2013, § 2). This is further supported with findings from a 2001 government study in England that was cited in the NAIS Trendbook for 2012-2013, stating that, “strong heads seem to adopt similar, well-balanced leadership styles and strategies that correlate with well-motivated students and staff” (NAIS, 2012a, § 148). These principles allow for many heads to be fiscal leaders as well as academic, cultural, and change-leaders as well.

Background and Objectives

In the summer of 2011, this researcher became the head of an independent school and began a progression towards learning as much as possible from the experiences of other heads of schools. Data-mining their experiences of the job affirmed the motto of this head's current school, “Aun Aprendo,” or, “I am Still Learning.” The objective of this paper is to discuss leadership strategies with heads of schools in California, with the hope of finding common threads to support other heads of schools that are also looking to learn from the experience and wisdom of independent school leaders. A second objective

is to determine the most common leadership challenges by examining the data provided by fellow heads of schools.

Additionally, it is the opinion of this researcher that heads of schools are global leaders as their communities, especially those leading boarding schools, are very diverse and made of students from around the world. For example, at this researcher's school, the student body represents eighteen countries and eleven states. This adds another dimension of potential challenges to the leaders, as they must relate to people from many different backgrounds.

The Current Paper

This researcher used a web-based questionnaire to solicit qualitative responses from heads of schools at independent schools in California about their perception of leadership challenges for themselves and their schools as well as the skills needed for heads of schools to be successful. One of the primary objectives of this research was to understand the perceptions of leaderships skills needed to meet the challenges of independent school heads in California. Although this research is preliminary in nature, the researcher had hoped that it would produce useful findings to assist him in the direction of further research. The samples collected in this paper are small in size and scope, and support broad conclusions about these perceptions as a whole; however, the researcher is confident that they will provide a starting point, directing further research in the future.

Methods

This paper involved gathering preliminary data by employing a qualitative based survey utilizing the online service, Survey Monkey (<http://www.surveymonkey.com>). The heads of schools were called directly and asked to participate in this gathering of data. These heads of school represent various types of school structures (i.e., elementary, high schools, etc.). The survey was sent via direct email to the participants and they were instructed that they had three weeks to complete the 10-question, qualitative survey. Two emails were sent out at the end of each week during that three-week period, reminding

the potential respondents to complete the survey. These reminders were also sent directly from the online survey service, Survey Monkey.

Sample

Of the 11 heads of schools who agreed to participate in this study, 8 completed the survey and three shared no responses. As shown in Table 1, the respondent heads of schools were drawn from different school types across California. Overall, the respondents were leaders and educators at Independent Schools of various configurations in Southern California.

Because challenges are believed to be similar at all independent school regardless of the grade levels offered, participants represented different school structures relating to grade levels being taught at each school.

Table 1

Head of School Participants

Type of school	Participants ($N = 11$)
Grades 9-12	3
Grades 6-12	2
Grades K-12	1
Grades 7-12	1
Grades K-8	1
Did not respond	3

Survey Questions and Findings

All participants received the same questions. The aim of the queries was to discern the perceptions of the independent school leaders regarding the challenges they face during the day-to-day operation of their schools, and to gain insight into possible solutions to meet those challenges. The following are the survey questions:

1. What do you see as the top three challenges for independent schools in the next 1-3 years?
2. What do you see as the top three challenges for independent schools in the next 5-10 years?
3. How have the demographics of independent school students changed over the last five years? How do you anticipate this to change in the future, if at all?
4. In your opinion, in the last three years, have most independent schools added programs/systems/infrastructure that promote environmental sustainability? Do you anticipate this trend (if yes) to continue in the future? Why or why not?
5. Do successful independent schools have programs that focus on being members of the global community? If yes, how do these programs add to their success?
6. How does the curriculum at independent schools, as compared to public schools, prepare students to be successful in the future?
7. What is the most important skill needed for an Independent School Head? Why?
8. How does the Independent School Head's relationship with his/her Board of Trustees contribute to his/her success?
9. How does the Independent School Head's relationship with his/her faculty/staff contribute to his/her success?
10. How does an Independent School Head's relationship with the parents at his/her school contribute to his/her success?

The responses from the questionnaire were transcribed for analysis into a spreadsheet from the collected responses in Survey Monkey. Analysis on the qualitative data was done using open coding and axial coding. Eight concepts were pinpointed, which centered around three main topics. Open coding is used to “open up the data to all potentials and possibilities contained within them” (Corbin & Strauss, 2008, p. 160). Axial coding was used to, “show the relationships between two or more concepts” (Corbin & Strauss, 2008, p. 183). This is how the three main topics were established. The topics were then analyzed for detection of the number of times that they occurred in the respondents’ answers and are shown in the results.

Results

Open coding and axial coding revealed the three main topics as: relationships finance, and enrollment. Please see table 2 for a representation of results from this survey data.

Table 2

Results From Survey Data

Concepts and main topics	Number of respondents who reported a concept ($n = 8$)
Relationships	
Parents	8
Trustees	7
Faculty/Staff	6
Finance	
Long-term Vision	7
Financial Aid	5
Endowment Growth/Management	4

Enrollment

Mission Appropriate Students	6
Diversity	5

Relationships

The relationships concept of independent school leadership included parents, trustees, and faculty/staff.

Parents. All respondents identified a number of reasons why the relationship between the head of school and parents is critical. These reasons are primarily associated in dealing with “problem parents”, trust, communication and working in partnership. Every head of school from time to time is confronted by an unhappy parent, and must be willing to problem solve. This can be either satisfying or frustrating – depending on the personality one is dealing with. One respondent commented:

Enjoying the company of parents can go a long way towards making your job more fun and your parent relationships more positive. And more importantly, when they see that you take pride in and devote energy to educating and promoting their kids, then all seems to go well. Parents, like all constituents, project their own psychology on to teachers and heads.

Trustees. Besides relationships with parents, 7 out of the 8 respondents identified positive trustee relationships, as a vital component of what an independent school leader needs as a fundamental part of his/her job. Trustees are the collective “boss” of the head of school and, often times, evaluate and make recommendations for goals that the head should work on. The majority of these comments centered on the relationship between the head of school and the board chair. One response was:

It is vastly important. Most heads get fired because they blow it in a board meeting. When one sees head tenures in the 4 or 5 or 6 year range, it might seem solid, but that is an unhealthy pattern. In the first 5 years a school head is only changing the window dressing, only making superficial changes. It takes time to change and improve the teacher culture of a faculty. It takes years to really strengthen the financial position of a school.

Another response, that spoke to the board as a whole and their role had the following to say:

It is critical...without the support and/or guidance of the Board, the Head and the School will encounter rough waters that could be fatal!

Faculty/Staff. The faculty and staff have the day-to-day experience of being at the school, just as the students and the head of school. The faculty works closely with the students and is delivering the education that each school works so hard to promote. Many respondents' comments centered on trust and gaining the support of the faculty and staff, identified as a critical leadership skill for heads of schools. One head of school responded:

How the Head gets a vote of confidence of the staff over time is essential. What a school needs in a leader depends and varies a great deal. It is important that there is a professional and clear working relationship and the boundaries of administrative authority and faculty responsibility are clear. There is a difference. Faculty need to know the rules, the boundaries and the expectations. There needs to be a respectful working relationship and understanding of the different roles and the different jobs.

Finance

The financial aspects of independent school leadership included long-term vision/sustainability, financial aid, and endowment growth/management.

Long-term vision/sustainability. Most organizations will typically be introspective, with goals and a strategy for where they would like to be going as a business. Typically, individual public schools do not have this kind of strategic vision; however, independent schools are innovative, as most have living strategic plans and visions that grow with the school and its community. They have purpose. It is the job of the head of school to communicate that vision/purpose, as one respondent commented:

Vision. You have to be able to see your community not only for what it is, but for what it could be. Then you have to be able to put the people and planning in place to help it get there. Ultimately, our schools need leaders who are as forward-thinking and ambitious as their students. It takes a lot of resolve to advance an educational institution, so a combination of passion, perspective, and productive patience is absolutely necessary.

Another respondent listed this as the top skill needed by an independent school head:

The most important skill is to be able to develop and maintain a strong VISION for what a great high school education can do for teens and then COMMUNICATE that vision effectively to diverse constituents: students, parents, alumni, neighbors, donors, and trustees.

Financial aid. Financial Aid could fall under Enrollment, however, this is often one of the largest expenses that an independent school has and, therefore, it has been included in the main topic of finance in this paper. As the cost of independent schools increase, and growth in the economy remains slow, financial aid is becoming increasingly important to the head of school. One respondent had a comment about the middle class:

“Due to the consolidation of wealth, rich families can easily afford \$30,000 tuitions, then some families qualify for financial aid and get close to a 100% grant, so the group feeling the squeeze is the middle class.”

Another head had a similar comment:

“People either have money or no money. A \$10,000 financial aid award will not help most families. Average grants will increase with tuition.”

Endowment growth/management. According to the NAIS, the average endowment for independent schools in the Western United States in 2005-06 was approximately \$8 million, compared to the average in New England that same year (the most recent year for which these data are available) of \$35 million (Bassett, 2013). This could be attributed to the fact that schools in New England tend to be older, however more research is needed to find out why this is the case.

One head of school had a cautionary comment to make regarding the importance of endowments at independent schools:

A sustainable financial model over time, with salaries/benefits, tuition, and financial aid is impossible to sustain if a school is not building an endowment. Schools carrying debt service have an additional burden.

Enrollment

Enrollment data focused mainly around the issues of diversity and the ability to recruit appropriate students. One head, who was asked about the top three challenges for independent schools over the next 3 years, responded:

“1) Enrollment 2) enrollment 3) enrollment - I am not sure about all independent schools, but the financing of a small liberal arts college may be the canary in the coal mine for boarding schools. Schools that do not have a clear mission or enrollment segment need to figure that out....quick...”

Mission appropriate students. Although no definition is given by the respondents, this researcher would define mission appropriate students as those who can help the school grow and thrive according to its mission, rather than students who are accepted with the intention of adding programs to meet the needs and interests of those students. Heads of schools are certainly feeling the need to maintain a group of students

who are committed to the school that they are leading – which in turn is a commitment to the vision. Four of the eight respondents commented on the ability to attract mission appropriate students – one example is as follows:

Most second and third tier schools are struggling for mission appropriate students.”

Diversity. Diversity is important to many independent school heads. Diversity among students, faculty, and even programming can help to attract an even more diverse student body. Some schools are doing a great job at diversification, as one head commented:

The diversity of our community - racially, ethnically, and socio-economically - continues to improve.

Another head commented on having a diverse group of students and its impact on the school community:

Yes. The diversity that global students and programs bring to our schools only increases their real world readiness.

Discussion

The goal of this paper, through preliminary data gathering, was to see if there were commonalities regarding the leadership strategies used by heads of schools in California to determine how these strategies affected the three areas perceived to be most significant: relationships, finance, and enrollment. The hypothesis was that these strategies would be similar regardless of what grades these heads managed in the K-12 realm. Certainly, a head of school has a multi-faceted job and has tremendous impact on the organization that he/she is managing. It was this researcher's intent to show the perceptions of these individuals' leadership skills, which are critical in hopes to inform others who may become heads of schools, and also to give rise to further research.

Because the economy in the United States is in a slow recovery, it is not surprising that many of the heads listed economic issues as a top priority, and enrollment

as another. Although the two issues are related and intertwined in schools, for the purposes of this paper, perceptions identified under admissions were issues of being able to identify students who were aligned with particular schools or who would increase the diversity of the community. Therefore, financial aid is listed under the finance section, as it is typically one of schools' largest expenses.

Relationships between heads and the various constituents with whom he/she interacts was a significant part of the survey and one in which almost every head of school talked about as being of extreme importance. Perhaps a good follow-up study could make an investigation into this area as a focus, with a larger sample representing schools across the United States.

Limitations

This study was a preliminary data gathering, and therefore was very limited in both the number of participants and the geographical area in which the heads of schools work. Because of this, generalizations cannot be made about these perceptions as they relate to the perceptions of all independent school heads in the United States; however, it does offer a suggestive pattern of perceptions/behaviors that could be hypothesized in future studies.

Conclusions

In summary, the perceptions of independent schools heads in Southern California, when asked about leadership skills that are important to their jobs and solving problems that may arise, focused in three areas. One area was relationships with trustees, parents, and faculty/staff. A second was finance, in areas of long-term sustainability/vision, financial aid, and endowment management/growth. The third was enrollment challenges in the two areas of diversity and mission appropriate students.

The findings are limited because of the small size of the sample; however, the heads of schools provide interesting anecdotes about the perceptions they have regarding leadership skills and how these skills apply to the day-to-day challenges each head faces. Often these skills and strategies are applied by heads of schools who are leading diverse

and global communities. More research will need to be done to include a larger sample from independent school heads from across the United States. Additionally, the results of this preliminary data gathering could point future researchers to narrow their focuses and investigate one of the three main topics identified in this paper – relationships, finance, and enrollment.

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**Understanding the MBA Student Experience:
Recommendations and Changes Necessary to Enhance Rankings**

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Abstract

This paper seeks to report on the MBA student experience and develop a greater understanding of students' needs. As business schools compete for high quality students and rankings, as well as the challenges of budgets, they often neglect to get input from their most valuable customers they serve: the students. Many students seek advanced degrees to further their knowledge and careers, and practical application of theory is necessary for skill development in the workplace. Further, having connections and observing professional behavior of the faculty and other students is a contributor in the perception of faculty effectiveness, professionalism, and ultimately, student satisfaction. In cooperation with the director of a graduate business school on the west coast, an outside consulting group of researchers, Global Waves, sought input from first-year and second-year MBA students, as well as alumni. This allowed researchers to gain insight and to fully understand the MBA student experience, describe current realities, and identify areas of potential improvement for the program. Using a mixed-methods approach, quantitative data was obtained through online surveys encompassing academics, student services, alumni and networking. Further, opportunities for MBA students and alumni to participate in phone interviews and in-person focus groups

provided qualitative data regarding communication, valued input, relationships, and rankings to enhance the survey findings, as well as feedback to the director and faculty of the business school. Findings indicated that the presence of a committed, caring, and capable faculty and staff, strong brand awareness, and limited local competition can allow for the potential to grow the program aggressively if its leaders so desire and to consistently attract talented professionals from the surrounding community. While most students were satisfied with both student services and their education, such as career relevance and real-world job preparedness, there was a need for more connection to having local business people participate in networking and as guest speakers. Further, the results also indicated there was little emphasis placed on partaking in national surveys, which impacts a school's ranking. After a SWOT analysis, many strengths and opportunities to enhance the program were discovered, as well as an awareness of which weaknesses and threats could be identified. As part of the MBA student experience, students should not only be immersed in the curriculum, but also be viewed as customers with valued feedback and input. Collaboration between the leadership, faculty, students, and local businesses can enhance the learning process and may be the key to student success. Utilization of technology and international business awareness may also contribute needed elements for strengthening the MBA student experience, career opportunities, and preparation in the competitive global marketplace.

Introduction

As business schools seek to improve their curriculum, enrollment, and rankings, they often neglect seeking input from the students they serve. The experience of students in an MBA program may be vital in establishing relationships before, during, and after enrollment. Evaluating these experiences can provide comprehensive feedback revealing both positive aspects as well as areas for improvement.

Background

The intent of this study was to evaluate an MBA program from a West coast institution committed to rigorous educational programs and the highest standards of education. As part of the methodology, current students and graduates were asked about their academic experiences. As part of the methodology, graduates were surveyed to enter the work force or to continue their education in graduate and professional programs are key components of the school's mission.

The university's "shared values" guide its decision making. These values include:

1. High expectations for student learning and success
2. Discovery through research, scholarship, and creative activity
3. Nurturing equity, diversity, and inclusiveness that promotes respect, support, and empowerment
4. Social, environmental, and economic sustainability
5. Strong, reciprocal, and interdependent relationships between the university and its surrounding region
6. An entrepreneurial, innovative, and unconventional spirit

Since the late 1960's, the school has offered master's in business administration (MBA) programs. By engaging a technology-driven, innovative curriculum, MBA students are provided with challenging opportunities to prepare for, or enhance, a successful career. The school offers a part-time evening MBA program, four dual MBA degree programs (e.g., an MBA/JD program), and an Executive MBA program.

Statement of the Problem

Business School leaders have implemented a variety of actions to enhance their MBA program in recent months. These changes were designed and employed based on feedback from students and faculty. In addition, budget realities have created a complex, challenging environment as these leaders have sought to improve the quality of the MBA student experience and demonstrate a commitment among all key stakeholders: students,

faculty, staff, alumni, and members of the broader university community. Additionally, the MBA program was previously been ranked in the top 100 in the 2012 *Businessweek*, but a lack of student engagement with the *Businessweek* ranking survey and methodology has been identified as the primary reason the program failed to earn this important, annual recognition.

Program leaders desired to have the MBA program evaluated for the purpose of better understanding current realities and identifying areas of opportunity for improvement. These leaders expressed an intention to revise their strategic plan and practices for their MBA programs during the coming year and have considered ways in which they might expand current curriculum and/or service offerings. It was determined that a comprehensive program review, including an assessment of the MBA student experience from pre-enrollment through graduation as well as alumni, was a necessary pre-requisite to further strategic planning.

Purpose

The purpose of the study was to fully understand the MBA student experience, to describe current realities, and to identify areas of potential improvement.

Previous Findings

Student Experience. Students enroll in graduate programs to improve their job skills, obtain new knowledge to do their current job or for an upward level job, and want new tools and resources to improve their job performance and future job prospects. One of the most important factors to a student is the application of knowledge and tools in the business setting. This idea was supported by a study by Karemera, Reuben and Sillah (2003), who found evidence that professional development and internship opportunities “are an important and integral part of the student learning experience and are associated with better academic performance” (p. 298). Ironically, academics teaching in institutions often lack industry experiences, providing theory and knowledge related to the business field, but not always pertinent information or personal experiences that are critical to the business milieu.

Student Satisfaction. De Shields (2005) suggests that “focusing on antecedents of student satisfaction, colleges and universities can align their organizational structure, processes and procedures to become more customer-oriented” (p. 128). The antecedents of student satisfaction include all aspects of the student experience, from the beginning to end of their time with an institution. This relates to a study by Arbaugh and Benbunan-Fich (2005, as cited by Endres, 2009), which showed “student satisfaction is affected by all aspects of the educational experience...satisfaction with course rigor and fairness, with professor and peer interaction, and with support systems” (p. 31). Howell and Buck (2012) concur that “student satisfaction with a course is important because it can contribute to student retention, and it can also be used as one way to assess faculty effectiveness” (p. 215). In addition, student satisfaction with their faculty can be related to seemingly unrelated factors such as professional dress (Carr, Davies, and Lavin, 2010), but the perception is that a well-dressed, professional faculty member is a business professional to be taken seriously. More than implementing a dress code, institutions should be aware that faculty can have a long-lasting impression on their students. A study by Hermann, Foster and Hardin, (2010), found the importance of “establishing clear expectation and a supportive environment at the beginning of a college course has a lasting impact on student attitudes” (p. 79). This stresses the importance of focusing on the right experience for students from the beginning of their educational pursuits.

Students and Relationships. As personal interaction and social media are ever present in both academics and business, social factors may have an impact on the student experience, as well as their academic performance and perception of a program. Student interaction with the instructor and each other has the largest impact on student satisfaction (Endres, 2009). Baldwin (1997) found that “social networks clearly mattered in student satisfaction, team project performance, and individual grades” (p. 1390), confirming widely held anecdotal beliefs that student relationships should be considered. Studies have shown that although students may indicate financial reasons for dropping out, the drop out is less likely to occur in the first place if the student feels connected to the university (Bennett, 2003). Student who feel they are an integral part of a university, are more likely to remain at that school and be loyal to it. Additionally, networking

amongst students enabled them to find resources and support to a greater degree (Baldwin, 1997).

Student-customer experience. Although most improvements at universities traditionally have been largely focused on curriculum design, student selection, and faculty development (Das, 1994 and Reilly, 1982 as cited by Baldwin, 1997), most do not focus on the student experience. Thomas and Galambos (2004) expand further on the idea that “if students are viewed as consumers of higher education, their satisfaction is important to institutional success, both because effective institutions should have satisfied customers and because satisfaction supports the recruitment of additional customers (p. 252). If university administrators do not consider students as customer, it will parallel the real world, where unfortunately, 80% of executives believe they offer a superior customer experience but just 8% of customers agree (Markey, 2007), which can result in decreased satisfaction, retention, and profitability.

The University as a Business Model. Carr, Davies, and Lavin (2010) agree that many “college and universities are keenly interested in developing a positive relationship with current students as well as maintaining contact with alumni for a variety of enrollment and financial reasons” (p. 101). Customer satisfaction plays an integral role in profits. In the for-profit world, those that segment and tailor their offerings and focus on customer satisfaction show annual profit growth of 15% while others are only 5% (Markey, 2007). Understanding target customer so well allows patrons to feel “heard” as the offerings designed make their customers say “this is absolutely perfect for me” (Markey, 2007, p. 33). By having university leaders display their interest in improving the student experience, the university becomes a model for business and profitability, demonstrates the ability to be innovative by changing the nature of the higher education marketplace, and applies theory to practice as an example for students. Getting insight from “customers” can improve the reputation of a business, draw in future prospects, and apply the same customer-oriented principles that are used in profit-making organizations (DeShields, 2005).

Methodology

As the school was seeking out information to improve the student experience, it was determined, after an initial interview with the MBA Director, that areas could be identified for improvement by using surveys, focus groups, and individual interviews. Information could be obtained from the students in a confidential and safe environment and, congruent to Reichheld (2006), will enable one to understand what the customer, in this case the MBA student, is thinking and feeling, and establishes accountability for the customer's experience.

Surveys

In order to measure student satisfaction, three surveys were created for first year students, second year students, and alumni, respectively. The surveys were based on Bloomberg *Businessweek*, which ranks MBA programs nationally. The *Businessweek* surveys “focus on end-users’ satisfaction” and include questions “on teaching quality career services, curriculum and other aspects of their experience” (Lavelle, 2011). The current MBA Program has been ranked highly in the past, but due to insufficient *Businessweek* surveys responses, the program was not ranked in the last year. One of the goals of this survey was to familiarize students with similar questions and also make sure they understood the importance of not only participating in this survey, but also for a *Businessweek* survey in the future.

Three separate surveys were then sent out to first-year cohort students, second-year cohort students, and alumni. The surveys focused on quantifying enrollment, academics, student services, alumni and networking. Parallel to the qualitative methods, such as focus group and individual interviews, students were asked several questions about variables such as communication, valued input, relationships with professors and other students, knowledge of *Businessweek* rankings, and suggestions for overall improvement for the program.

Focus Groups

Two focus groups, one for current students and one for alumni, were held at a local restaurant as an incentive for student participation. Five open-ended questions were

asked, and students were encouraged to speak freely and openly about their MBA experiences to get insight into what works for the program, what is not working for the program, and suggest what can areas can be improved.

Individual Interviews

Seven individuals were interviewed and asked five questions about areas which included:

- Communication
- Value
- Preparation
- Awareness
- Satisfaction

These interviews allowed students to communicate their relationships with professors and other students, express their knowledge of *Businessweek* rankings, and make suggestions for overall improvement for the program. The interviews were later coded for emerging themes.

Findings

Project findings suggest that the MBA program is characterized by numerous strengths. Chief among these strengths are the presence of a committed, caring, and capable faculty and staff. Strong brand awareness and limited local competition (several respondents described the program as the “the only legitimate game in town”) suggest that the program also has the potential to grow aggressively if its leaders so desire and to consistently attract talented professionals from the surrounding community. Students and alumni consistently reported that their program curriculum provided career relevance and real-world job preparedness. The program also claims a highly interested, satisfied alumni community.

During the course of the project, participating students and alumni identified several areas for potential improvement. Some expressed concerns about what they perceived to be inconsistency of faculty qualifications, responsiveness, and commitment

to student success. These concerns were few in relative number (in fact, the majority of faculty-related comments were highly favorable), yet the concerns consistently surfaced in survey, interview, and focus group results. Students sought to put these concerns in context by speaking of “one or two” or “a few” faculty members as the source of concern. A perception of inefficiencies, redundancy, and overlap among and within courses, coupled with evidence of concern surrounding the overall quality of course experiences also surfaced within the findings. A strong concern about lack of flexibility and opportunity in terms of course offerings (e.g., time of day, frequency) was also expressed.

Substantial leverage opportunities seemed apparent and readily available to participants. Overall satisfaction with the program is high among all stakeholders. This suggests the presence of an interested, invested community that may be likely to engage at higher levels when asked (e.g., to drive *Businessweek* response rates; to grow enrollment via a referral program, etc.). Awareness of the importance of the *Businessweek* program rankings process was clear, but participants seemed unsure of specific details or next steps. There is also a lack of enthusiasm for the rankings process and some genuine disappointment with the most recent results.

Participants expressed consistent and enthusiastic interest in the development of a curriculum that integrates local business as partners in the learning process. Both students and alumni consistently suggested that the school seems likely to present a myriad of opportunities to engage in local business partnerships to enhance the quality and relevance of the curriculum.

Findings suggest that the program may be vulnerable to increased competition, slips in student satisfaction, and/or “rogue” employee performance. Brand awareness and enrollment based on convenience, not necessarily on program quality and reputation, could leave the program challenged to respond to increased competition (e.g., high quality, online programs) in the local marketplace. There appears to be a consistent undercurrent of dissatisfaction the approach employed by a small number of faculty members. On the whole, students are clearly satisfied with their experiences with the

faculty, but students and alumni participants both consistently expressed a strong level of dissatisfaction with particular faculty.

Survey responses, listed in Table 1, were mostly in the “neutral” or “agree” categories. Little evidence exists of satisfaction at the highest levels (i.e. “strongly agree”) among survey results, suggesting students may be “ok”, but not strongly committed, to the school.

Table 1. Survey Findings

	Pros	Cons
Graduate Staff	<ul style="list-style-type: none"> -strong satisfaction -helpfulness -availability -adequate admission process 	None expressed
Academics	<ul style="list-style-type: none"> -requirements measured ability to succeed -faculty has commitment to student success -aligns with career goals 	<ul style="list-style-type: none"> -dissatisfied with variety of courses -dissatisfied with times/days -curriculum not motivating -lack of rigor -lack of perceived qualified faculty
Services	<ul style="list-style-type: none"> -library staff helpful 	<ul style="list-style-type: none"> -lacking web presence -lack of awareness of services offered (writing center, tutoring)
Relationships	<ul style="list-style-type: none"> -alumni felt program helped to achieve professional goals -satisfied with program 	<ul style="list-style-type: none"> -reputation needs improvement -lack of feeling part of a community

Interview Findings

Complete transcripts of all student and alumni interviews were coded according to a criteria and results rubric. Four primary observations emerged from student and alumni telephone interviews:

1. *Faculty inconsistency*: Participants described examples in terms of teaching methods, communication style, and availability.
2. *Faculty lack of “real world” business (industry) experience*.
3. *Strong curriculum alignment*. Participants expressed that the curriculum is relevant, consistent with student goals, and prepares students for career advancement.
4. *Need for networking*. Participants expressed a desire for more networking and partnership opportunities with local businesses.

Focus Group Findings

Complete summaries of student and alumni focus groups, presented in Table 2, were congruent with survey and interview findings, citing “helpfulness of faculty and staff is appreciated and essential to the MBA experience”

Table 2. Focus group comments

	Pros	Cons
Currently enrolled students	-The Library is, by far, the most used student services resource.	<ul style="list-style-type: none"> - Desire for more schedule flexibility and electives (particularly in the entrepreneurial area). - “Broken classes.” Inconsistent faculty standards and practices were described. A strong desire existed for professors who possess more, real-world experience. - Networking opportunities with local business community and alumni needed

		- dissatisfaction with orientation
Alumni	<ul style="list-style-type: none"> - MBA experiences had enhanced their careers - the highest quality course experiences were those led by highly qualified, committed faculty 	<ul style="list-style-type: none"> - dissatisfaction with orientation -faculty preparedness and responsiveness varied - desired more “real-world” experience among the faculty - inefficiencies within the curriculum (e.g., entry-level content, IT requirements, redundancy)

Discussion

The data collection results conclude that to increase its *Businessweek* rankings, the school should focus on, and enhance student satisfaction. Endres (2009) found that student satisfaction predicted student intention to recommend the course, faculty, and university to others. Word of mouth and customer loyalty reduce marketing expenses and lead to success over time by having customers that “speak well of you”, which can be particularly beneficial to non-profit organizations (Reichheld, 2006). Taking advantage of students’ insight may help to improve the program’s reputation and rankings, draw in future prospects, and apply the same customer-oriented principles that are used in the real world (DeShields, 2005).

It seems that program leaders are already aware of and acting on this opportunity to involve students in their own satisfaction by integrating social mixers and networking opportunities. Baldwin (1997) observed that student interaction could lead to positive student achievements such as cognitive processes and creating an emotional climate conducive to learning. Peer interaction in an educational context can significantly influence students' achievement and satisfaction, independent of their course work or instruction.

Recommendations

Consistent with the projects purpose, its findings, and insight gleaned from relevant academic literature, the following were recommended:

1. A relentless, consistent focus on continuous improvement. Program leaders have taken a first step in what could become an ongoing, highly visible, continuous improvement campaign designed to culminate annually with the administration of the *Businessweek* rankings survey and the publication of its corresponding results. The *Businessweek* ranking results could be held up as one key performance indicator of program quality that will be central to the campaign. All members of the community could be educated on the nature of these rankings, ranking categories, and the importance of the rankings to the program. The rankings could be constantly and aggressively promoted via in-class discussion, posters, and/or email with a heightened emphasis leading up to survey launch and administration.

2. Student outcome measures. Identify, track, and share other internal measures of program quality and could seek to define quality as expressed primarily in terms of student outcomes. Possible student outcome measures might include:

- Student retention rates (1 year, 2 year, 3 year, etc.).
- Student satisfaction rates.
- Cohort-specific graduation rates.
- Total program enrollment; enrollment growth; demographic-specific enrollment.
- Employer and alumni survey results to program identify impact post-graduation.

3. Faculty engagement and consistency. Identify and focus annually on real world experiences and local business networking opportunities. Celebrate and reward top faculty to spotlight the best the program has to offer while potentially improving and nurturing faculty morale and engagement.

4. *Develop local business partnerships.* Field trips to outside businesses, guest speakers, and networking opportunities allow for a greater understanding of the application of theory.

5. *SMART goals.* Establish specific, measurable, attainable, relevant, and time-bound (SMART) goals in collaboration with all members of the program community. Progress relative to these SMART goals could then be measured and shared in a consistent, visible way with all stakeholders.

6. *Continuous improvement campaign.* Building from baseline results, the student experience presented could be used to develop and assess specific progress over time using similar instruments, email templates, interview scripts, surveys, and focus groups. This would allow program leaders to easily and efficiently conduct the project again using the same methods and instruments on a regular basis.

7. *Transparency.* Program leaders could examine and publish each set of results carefully, providing commendations, as well as responding to new areas for improvements. Program leaders may want to regularly share outcome data and all project results with the entire MBA community to promote trust and a climate of openness.

8. *Other Creative Possibilities to Consider*

-A “*students’ rights and responsibilities*” document. Includes expectations, quality of instruction, course engagement, availability of course offerings, responsiveness of faculty, and student leadership and mentoring.

-*Student-faculty forums.* Bringing students and faculty together in a non-class forum to share ideas with, and learn from, each other.

-*Mentoring.* Peer-to-peer mentoring, alumni mentors, and faculty mentors may help build relationships that lead to successful careers.

Conclusion

This study, which provided a comprehensive review of the business school and student satisfaction ratings, provided results to assist the business school in understanding and improving the experience of its MBA students. In keeping with the focus as the students as the “customers”, the business school will be able to set a precedence for innovative insight to improve its program and serve their students. If recommendations are applied, this will provide a stellar educational experience that will attract quality students and faculty, produce successful alumni, a profitable program, and lead to the overall goal of improved future *Businessweek* rankings.

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Leading Organizational Culture Transformations through the Art of Storytelling

Ms. Senk is a recognized health, fitness, and wellness expert with over 20 years of experience, and is currently a full-time professor and the Coordinator of the Fitness Specialist Program at Rio Hondo College in Whittier, CA . Additionally, she has served as the Student Learning Outcomes Coordinator, Instructional Technology Chair, and will be the Coordinator of Rio Hondo's satellite Educational Center in El Monte, Spring 2015.

An international presenter, Ms. Senk has authored several articles on Neuroscience, Positivity, Wellness, Technology and Learning. She has been a book reviewer for Pearson Publications, a reviewer for conference submissions, and a consultant for improving student learning in higher education. Her current visionary pursuit is developing *VISIBLE*, a support and educational program for student-veterans returning to college, as well as executive training programs to enhance performance and productivity.

Ms. Senk obtained her bachelor's degree in Exercise Science and her master's degree in Exercise Physiology from the University of Connecticut, where she also was a member of the nationally ranked and Big East Champion softball team. Currently, she is a doctoral candidate in Organizational Leadership at Pepperdine University.

Profiling the Virtual Leader – The Good, The Bad, and The Ugly

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Placencia, Belize

INTRODUCTION

The culture of virtual work has become increasingly rooted over the past 42 years. Economic challenges and technology associated with a global economy have set the stage for a more connected workforce in more disconnected venues. Employees no longer need to be tethered to a desk and chair in a corporate office since work and collaboration can occur from a home office, a client's conference room, and even the beach. Parents can respond to emails while watching their children's soccer games and virtual leaders can reach out to their virtual employees across time zones and geographic corporate boundaries.

However, while the presence of virtual work has become more pervasive, the need to examine the factors that define and impact a successful virtual organization has become increasingly important. For example, in February 2013 Marissa Mayer, CEO at Yahoo, revoked telework options for a number of Yahoo employees (Tkaczyk, 2013). Mayer stated, "people are more productive when they're alone, ... but they're more collaborative and innovative when they're together. Some of the best ideas come from pulling two different ideas together" (Tkaczyk, 2013). Overall, the policy change affected some 200 employees out of the 12,000 employed by the company. Nonetheless, the announcement created a flurry as to whether telework was in decline. Fundamentally, the issue comes down to making virtual organizations successful. Offstein and Morwick addressed the issue most succinctly by stating, "Leadership makes telework,

work” (2009, p. xvii). And according to SHRM, “Effective leadership is the number one factor that influences success in a virtual organization” (2010, p. 1).

Hence, the need to focus on leadership and the components of a successful virtual organization are important. Research tells us a successful a virtual organization is one that offers metrics greater than or equal to a comparable in-office organization in terms of employee productivity, retention, attendance, professional development, and upward mobility. Research further indicates that frequently virtual organizations fail to meet these criteria. Unfortunately, all too often virtual leaders do not navigate very well through the challenges associated with guiding a virtual workforce, and find their virtual teams do not achieve predetermined metrics and thus are deemed failures (Morris, 2008). In fact, less than half of telework situations succeed due to inexpert leadership (Walinskas, 2012). Moreover, virtual projects and employees are more likely to fail if leaders employ the same leadership traits at the same levels for the virtual workforce that they use for co-located employees (Walker, 2010). Hence, it is imperative that leadership makes adjustments in behaviors to accommodate the distance factors of time and space associated with virtual employees. Though everyone in an organization needs to take some form of ownership for properly defining interaction with the virtual workforce, the majority of the responsibility falls to the leader who must first focus on trust rather than technology (Morris, 2008).

Prior to making a leap into the virtual workspace, organizations and leaders need to focus on a well-constructed implementation plan. Overall, implementing a virtual organization is no easy task and involves three segments as indicated in Figure 1. The

first segment is the pre-implementation segment. In this phase of implementation front-end analysis, assessments, and initial training take place. This is also the time when the need for additional and upgraded technology occurs. The second segment addresses live implementation and executes training, technology installation, and the commencement of actual virtual work.

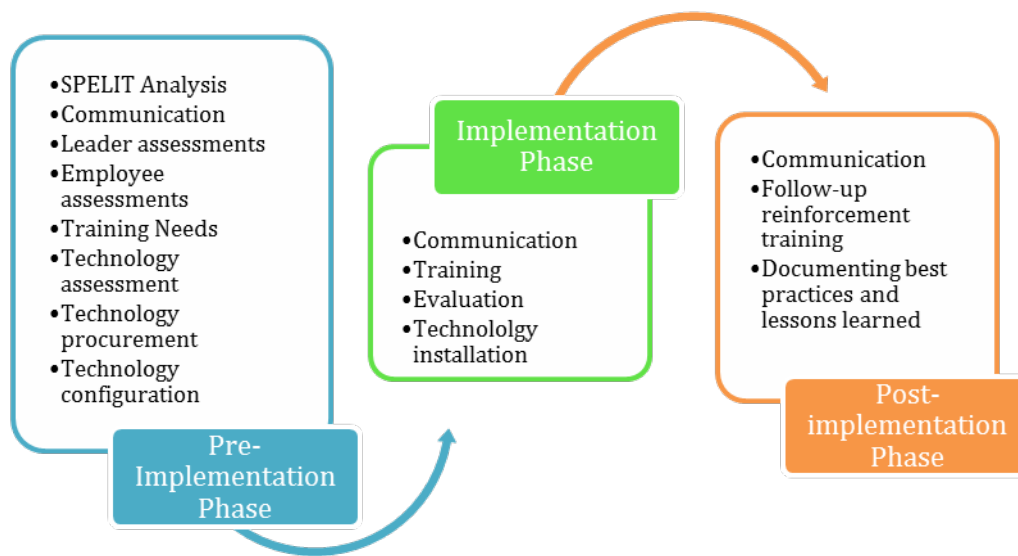


Figure 1

Implementing Virtual Organizations

This presentation is designed to focus on several components of the pre-implementation phase; the organizational analysis, leader assessment, and training needs. As shown in Figure 2, these components build on each other and first require an overarching view of the organization before a go/no-go decision is made to move into creating a virtual organization. This includes a SPELIT analysis of the social, political, economic, legal, intercultural, and technological landscape of the organization (Schmieder-Ramirez & Mallette, 2007). The second component of this presentation

speaks to profiling leaders concerning suitability for leading and/or working in a virtual organization. The assessment, known as the Virtual Leadership Assessment Survey (Gladys & Schmieder-Ramirez, 2014), uses the framework of the SPELIT Model (Schmieder-Ramirez & Mallette, 2007) to identify those areas where the virtual leader is prepared to lead the virtual organization, and also targets areas that require additional virtual leadership training.

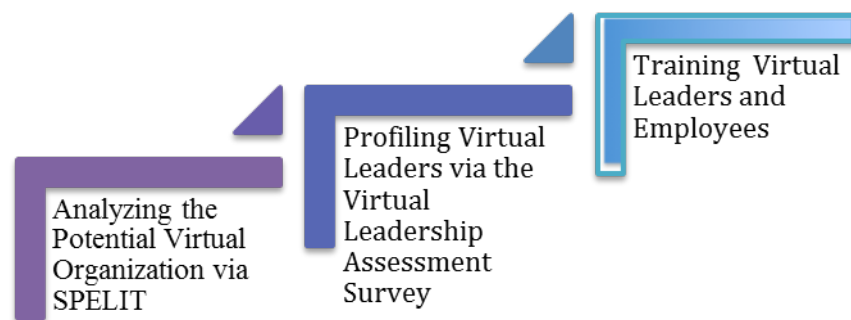


Figure 2

Stepwise Approach for the Early Stages of Creating a Virtual Organization

This stepwise approach offers the foundational elements without which, it is highly unlikely a virtual organization can be successful. Of particular import, is the use of the Virtual Leadership Assessment Survey. Based on qualitative research done with virtual employees, this assessment tool has been created to measure the readiness of leaders to lead virtually. Today you will be offered the assessment to see just how well suited you are to leading a virtual organization or team!

HISTORICAL BACKGROUND

The practice of virtual work, or teleworking as it is sometimes referenced, is not new. In fact, the roots of the virtual workforce go back to 1972, when Jack Niles, “The Father of Telecommuting”, then a University of Southern California researcher, merged the idea of telecommunication with transportation (Joice, 1998). According to Joice (1998), it was Niles who first used the terms telework and telecommuting. Joice (1998) states that in 1979, “flexiplace” was the term in vogue, and in 1981 J.C. Penney launched its first call center of home-based catalogue order-takers. By 1993 the Federal Government provided an official endorsement of telecommuting (Joice, 1998); and over time the size of the virtual workforce began to grow with numbers of eight million in 1995 to 11 million 1997 (Joice, 1998). Though technology and economics were the primary drivers, government and industry quickly started to see benefits in employee recruitment and retention (Joice, 1998).

During the initial stages of the virtual workforce, there was greater emphasis on the logistical elements of telework and less attention on the virtual worker, and a new type of leader - the virtual leader. Particularly in the public sector, significant effort was devoted to authoring policy, acquiring equipment, and articulating time keeping procedures (Joice, 2000). Little, if any, focus was directed to leadership training for the virtual enterprise leader. In fact, it wasn't until 2003 that a handbook for managers and supervisors was drafted (Office of Personnel Management, 2003). Solomon (2000) asserts, "While employers may provide equipment and technology to telecommuters, that doesn't mean there will be a good cultural fit" (p. 60). Solomon emphasizes that with a

focus on the virtual employee as an individual, improvements can occur in areas such as attendance, recruitment, retention, and morale (2000).

With time, momentum for the virtual workforce increased and 2008 became the year that had the greatest impact on telework due to recessionary impacts, increases in the cost to commute, reaction to terrorism and continuity of service, increased emphasis on well-being, and dramatic improvements in technical connectivity (Hunton & Norman, 2010). These changes, especially the extraordinary leaps in technology set the stage for a new work model. Gibson, Blackwell, Dominicus & Denerath posit "Technological revolutions lead to people revolutions" (2002, p. 80); and so is the case for technology and its impact on advancing the revolution in virtual work, and how work is performed in and out of the office.

In sum, the virtual "revolution" that began in 1972 has taken root due to technology, the competitive marketplace, and globalization. It has brought benefits and challenges to both leadership and to the virtual employees who report to them. Over time, research has come to demonstrate that the shift to the virtual workplace involves much more than a blueprint for scaling technology; it requires a change strategy in leadership of those who work in the virtual space.

THE SPELIT MODEL AS THE FRAMEWORK OF THE VIRTUAL ORGANIZATION

One of the most comprehensive approaches to analyzing the organizational dynamics of change is through the SPELIT Model (Schmieder-Ramirez & Mallette, 2007). When used to assess an organizational shift to a virtual architecture, the SPELIT

Model provides a methodology for leadership to give due consideration to the factors involved in the change initiative.

These factors comprise the driving forces in social, political, legal, intercultural, and technical realms via the SPELIT Model (Schmieder-Ramirez & Mallette, 2007) and are critical to understanding the current climate of the organization as well as gaining insight into the forces that may jeopardize the move to a virtual environment. By segmenting the overview of corporate drivers into separate environments, SPELIT offers insight into issues that may be overlooked through other analyses. The following paragraphs examine each of the SPELIT factors in terms of driving forces in the virtual workspace.

Social Environment. The social environment of SPELIT includes reflection on the “social networks, reporting structures, and social cultural norms in an organization” (Schmieder-Ramirez & Mallette, 2007, p. 6). If the current social aspect of an organization is one that is short on social networking among coworkers, or maintains a strongly directive chain of command leadership orientation, or a culture undervalues training and education, the move to a virtual architecture will be more challenging and less likely to be successful. Unfortunately, operational leaders in a company may see multiple organizational layers as a way to grow their organizations and ensure protection of their individual turf. As a result, leaders maintain a strong hold on their employees in a highly structured command and control culture. Old school corporate hierarchies fraught with fiefdoms or dated and archaic technology that impede communication, serve to minimize the social interface so important to establishing viable virtual organizations.

Though research indicates that some 33% of all workers would opt for teleworking over a raise in pay (Snyder, 2012), impediments to operating a successful virtual team may outweigh the benefits of working virtually. Ultimately, what is needed to effectively implement the social aspect of a successful virtual organization is a trusting, empowering, collaborative, and technologically current environment for the virtual workforce that will include training for both the operational leaders as well as the employees (Gladys, 2014).

POLITICAL ENVIRONMENT. Both Government and commercial entities must deal with political issues. This is especially true when establishing virtual organizations. From the governmental side, the Telework Act of 2010 is a driving force that requires agencies implement teleworking and report extensively on the outcomes. This can be a two-edged sword for agency leaders. If an agency appears to be successful at telework, internal leaders risk a flattening of the hierarchy and possible loss of political organizational stature. If an agency is unsuccessful at implementing telework, leaders face possible loss of position and power – to say nothing of being dragged through the press for their failures. In this situation both internal and external politics loom large and carry considerable risk.

For the commercial/private sector environments, shareholders, stock analysts, and board members constantly demand positive actions that result in positive changes in the financial posture of corporations. All of these stakeholders influence decisions within companies as well as the future of leaders within the companies. Hence, there is considerable competition among operational leaders to build their respective “empires”,

and hoard information so as to be considered indispensable. Given the significant financial savings of migrating employees to a virtual environment of some \$10,000 per year per employee (Shahan, 2010), many leaders have no recourse but to implement telework. Once again the two-edged sword appears: if a leader is successful at implementing a virtual organization he or she risks a loss of power and control; and if the leader is unsuccessful in the process of running the virtual organization, the risk of losing his or her job becomes imminent.

As a result, leaders of both government and industry face the possibility of their organizations losing power/political positioning within the overall agency or corporation. Navigating political waters is challenging; and in the case of implementing a virtual organization, the risks are extraordinarily high considering that more than half of these organizations fail. Therefore, it is incumbent on leaders of virtual organizations to prepare for and lead in a manner that will derive the highest levels of operational performance.

ECONOMIC ENVIRONMENT. As described earlier, the current economic global environment is at a critical stage. Companies around the world are taking action to maintain an economic foothold by protecting their brands and through leadership that espouses empowerment that leads to innovation (Friedman, 2005). For example, the Tata Corporation, an India based corporation that maintains a presence around the globe with 350,000 employees, anchors its mission on trust, responsibility, integrity, and community (Witzel, 2010). In fact, Tata has codified, through its mission and values statements, its conduct with customers and employees (Witzel, 2010). Tata's brand and culture are

inextricably woven and its success is a tribute to its well-defined employee oriented mission and values (Witzel, 2010). As a result, Tata has continued to enjoy economic success (Riley, 2012).

Other companies face the same economic challenges as Tata, and can find success in the tangled economic environment as well by increasing productivity while decreasing costs. Implementing virtual organizations and teams can drive an increase in productivity as much as 40% (Yu, 2008); and costs can be reduced significantly by as much as \$10K per year, per virtual employee (Shahan, 2010).

LEGAL ENVIRONMENT. The legal environment impacts virtual organizations in several ways. The first of these speaks to policy concerning working from home. Not unlike the Federal Government, there is the equivalent an “iron triangle” (Peters, 2010) in industry. Whereas in government there are administrative agencies, Congress, and special interests groups operating at the nodes of the triangle and driving change in the direction of virtual work; in corporate America, there are members of senior leadership, the Boards of Directors, and HR/change management organizations that are promoting the virtual workspace as well. Each of these nodes of the corporate triangle discusses, debates, and evaluates proposed changes to corporate policy. In the case of establishing policy for the virtual workforce the process entails evaluation, consideration, debate, and consensus from the three nodes of the corporate “iron triangle”.

The second element of the legal environment is concerned with the Federal Occupational Safety and Health Administration (OSHA). While OSHA does not regulate home office spaces, companies are nonetheless required to report accidents whether they

occur in the corporate office space or in the home office space (Occupational Safety and Health Administration, 2000). When accidents occur while an employee is working at home, the incident must be documented. This creates risk for the organization as future litigation may result if the organization has been negligent in the installation / placement of computer equipment in the homes of employees.

The third legal factor goes to workers' compensation. In general, workers' compensation is payable to employees who work from home. However, the rules and guidelines vary from state to state (National Federation of Independent Business, n.d.). Legal specialists within each company will need to be conversant with the state-to-state nuances concerning workers' compensation. It is essential they understand the privacy provisions for virtual employees, encourage safety, and stress the importance of ergonomic furnishings for employees while they work from home.

The fourth legal issue is concerned with lease renegotiation or termination for existing brick and mortar office buildings. Corporates need to negotiate alterations to space requirements, downsize and reconfigure as needed, and pay / negotiate associated lease modification or termination fees.

INTERCULTURAL ENVIRONMENT. When corporations have worldwide locations, the intercultural environment requires consideration and analysis for any major corporate transition from formal office to virtual venues. As it relates to converting an in-office worker to a virtual employee, there are differing levels of acceptance in each country. The international level of acceptance of telework is driven to some extent by the economic wealth of the country. For example, housing conditions in Central American

countries may not offer a room or square footage for staging an at-home work environment (Manpower, n.d.). Additionally, obtaining in-home Internet service and acceptable bandwidth may hinder implementation of virtual offices in other countries. Hence, prior to launching telework in a given country, it is important that companies consider whether working virtually is logistically viable for the workforce in that country. For companies that have kept interface with international teams to a minimum, organizations would do well to consider using the Intercultural Development Inventory (IDI) to assess how well the workforce is positioned to team across cultures, and identify cross cultural training classes that can foster international collaboration.

In addition to the cultural influences that exist on an international level, there are also cultural considerations that exist within each organization located in the same country. These considerations speak to the degree to which employees share perceptions and support of the corporate mission. That is to say, in advance of adopting a telework initiative, do all of the employees share the same values concerning work ethics, and organizational objectives? Ensuring an alignment within the corporate culture can be core to a successful transition to a virtual organization.

TECHNICAL ENVIRONMENT. As discussed in the social environment section above, there can be challenges with respect to the technical environment as platforms can become dated and possibly not scalable to newer approaches to processing information. Making the leap into the virtual workforce requires that organizations upgrade technology in terms of hardware, software, groupware, and video. Transitions to leading edge technologies will serve to improve productivity through enhanced system response

time, improved organization of data, and leading-edge collaborative methods of sharing information and developing innovative solutions for clients.

Table 1 offers insights into the driving forces of the environmental areas of the social, political, economic, legal, intercultural, and technology facets for establishing and sustaining virtual organizations.

Table 1

SPELIT (Schmieder-Ramirez & Mallette, 2007) *Considerations for Virtual Organizations*

Environmental Areas	Driving Force 1	Driving Force 2	Driving Force 3	Driving Force 4	Driving Force 5	Driving Force 6
Social	Social networks and social interaction need to be maximized	Excessive layering in the hierarchy can limit employee to employee interface	Employees desire virtual work venues but operational leaders might mistrust employees	Millennials expect alternative workplace options	Operational leaders lack leadership training – including virtual leadership training	Employees may receive little training and/or have no training to work in a virtual environment
Political	Government is a motivating force toward smaller corporate carbon footprints and is driving “greener” corporations	Internal corporate politics are a continual impetus toward reduced office costs	Stockholders and the board are demanding a positive change in finances	Operational leaders are a counter force to virtual work since it impedes “empire building” and threatens “turf”		
Economic	Global financial indicators are tenuous so costs must come down and productivity must increase	Telework can save organizations \$10,000 per teleworker annually (Sanhan, 2010)	Properly led, organizations that telework can increase productivity as much as 40% (Yu, 2008)	Costs need to be factored in for upgrading technology		
Legal	Telework policies and procedures are required to avoid unnecessarily high level of risk	In-home ergonomic and safety risks can leave virtual organizations vulnerable	Worker’s compensation varies from state to state and must be researched to ensure adherence	Technology presents security risks and make virtual organizations vulnerable	Lease terminations / renegotiations present potential legal issues	
Inter-Cultural	Multi-national organizations should institute IDI intercultural assessments and training to virtual employees	The ability to accommodate telework differs by country and presents logistical/technical challenges	Organizations need to ensure virtual employees share corporate values and objectives			
Technical	Advances in video technology support telecommuting	Collaborative software enhances peer to peer project work	Upgraded systems support state of the art email systems			

Using the SPELIT Model (Schmieder-Ramirez & Mallette, 2007) to analyze a transformation to a virtual venue offers insights into what it may take for leaders and employees to transition into virtual work. The following section identifies profiles of individuals who are suited or not suited to lead virtually.

PROFILING VIRTUAL LEADERS

In February 2014, qualitative research with virtual employees was performed to ascertain which specific leadership behaviors helped or hindered the success of a virtual organization (Gladys). The problem this study addressed dealt with reducing the incidence of failure within virtual organizations by examining the perceptions of virtual employees related to leadership behaviors that positively or negatively affect their work performance in a virtual setting and ultimately the success of their organization. The intent of this research was grounded in the premise that the views of virtual workers could shed light on which leadership behaviors help or hinder the performance of the virtual workforce. Hence, the propose of the research was to identify specific leadership behaviors that add to or detract from the most important influencers of a successful virtual organization – employee productivity, retention, attendance, development, and promotions. The following table offers profiles for leaders that are more or less suited to leading virtually.

Table 2

Profile for Leaders More or Less Suited to Virtual Leadership (Adapted from Gladys, 2014)

More Suited Virtual Leader	Less Suited Virtual Leader
Is proficient in sharing the organizational vision and providing contextual leadership	Has somewhat of a negative attitude
Is trusting	Is demanding
Is attuned to verbal and written cues	Needs to have total control of his/her organization
Is comfortable delegating projects	Is a poor planner and is prone to issue last minute assignments
Has well-developed social skills that are equally effective in person, via voice, and in electronic interface	Requires status input at a level of seemingly infinite detail
Is comfortable working outside of a command and control environment	Views employees as generators of output rather than human resources
Solicits opinions	Is reluctant to request support and resources from upper management
Is tactful	Is loathe to provide quality assignments to employees who work off-site
Is outward focused versus inward focused	Is rude or disrespectful to employees, denigrates others
Is self-aware	Lacks strong communication skills – tends to interrupt
Is responsive	Tends to hoard information – believing information is power
Maintains control of emotions	Does not believe employees will work and honestly report hours if they are out of the office
Adapts well to change	Is not an engaged leader
Consistently recognizes and rewards workers	Cannot, or does not, clearly articulate expectations of employees
Offers regular feedback, appraisals, and authors and executes employee development plans	
Maintains a social connection with employees that demonstrates interest and concern	
Shares information in a transparent manner	
Makes assignments that are skill and experience appropriate	

Is clear with project assignments in terms of objectives, deliverables, and milestone dates

Facilitates collaboration and synergy

Is open and honest

Positions employees for advancement

Uses multiple forms of media to communicate

So, what does it take to successfully lead a virtual organization? According to Gladys (2014), it takes the following:

- It takes leadership actions that reflect a deep and genuine interest in the virtual employees, as well as an effective level of communication across all types of media.
- It requires trust and the willingness to empower all members of the team and provide them with meaningful work assignments.
- It takes recognition and rewards, and a plan to take employees to greater heights through training and promotions.
- It takes virtual leaders with a flexible leadership style, well-honed human, conceptual, and technical skills, and a sense of contextual intelligence to successfully lead a virtual organization.

The message here is that without increased leadership over and above that in traditional brick and mortar offices on the part of those who manage virtual employees, the likelihood of success diminishes. “Simply put: virtual leaders need to be trained to lead virtual organizations, they need to lead more rather than less, and they need to employ behaviors that ignite a spirit of commitment, and performance on the part of virtual employees” (Gladys, 2014, p. 135). In the most succinct words, "Leadership

makes telework work" (Offstein & Morwick, 2009, p. xvii). The following section speaks to profiling virtual leaders via the Virtual Leadership Assessment Survey and was designed by combining the elements of success for a virtual organization with the factors of the SPELIT Model. If leadership is really going to make telework work, then identifying the right leaders is integral to creating successful virtual organizations!

THE VIRTUAL LEADERSHIP ASSESSMENT SURVEY

The Virtual Leadership Assessment Survey took root from research performed in 2014. Qualitative by form, the research brought focus to the perceptions and insights of virtual workers concerning behaviors of their leaders. As a phenomenological examination of the lived experiences of these virtual employees and their perceptions of leadership behaviors that positively or negatively impact the success of a virtual organization, the research offers a perspective of virtual leadership from the vantage point of the virtual employee. The intent of this exploration was to bring specificity to the role of leadership behaviors within the virtual workforce in the hopes that leaders in a virtual venue will adopt positive behaviors to increase the odds of success in their organizations with respect to employee productivity, retention, attendance, development, and upward mobility.

The theoretical framework for the inquiry centered transformational leadership introduced by Burns in 1978 and expanded on by Bass in 1985 with a core focus on interpersonal elements and traits such as individualized consideration, intellectual stimulation, inspirational motivation, and idealized influence (Bass & Riggio, 2006, p. 176; Jogulu & Wood, 2007, p. 37). Since all too often virtual leaders do not navigate

very well through the challenges associated with having a virtual workforce, they find their virtual teams do not achieve predetermined metrics and thus are deemed failures (Morris, 2008). The early Virtual Leadership Assessment Survey research was designed to search for insights from virtual employees as to which specific leadership behaviors may remedy this situation.

Using the SPELIT Model along with inter-rater reviewed qualitative research; the Virtual Leadership Assessment Survey was designed and developed to evaluate "fitness for duty" as a virtual leader and to identify areas of training to assist in the development of qualified virtual leaders. As such, the Virtual Leadership Assessment Survey evaluates:

- the degree to which a virtual leader is inclined to be attuned to the human elements of leading virtual employees (social dimension)
- the level and quality of interface a leader maintains with colleagues, ancillary support organizations, and headquarters (political dimension)
- the impact of profit/loss parameters of the organization on the leader
- the legal factors and legitimate power of the leader (economic dimension)
- the degree to which the virtual leader creates the sense of value and mission across the culture of the organization and the cultures within the organization (intercultural dimension)
- the level of technical savvy the leader possesses and maintains and provides for the organization (technology dimension).

By evaluating these areas, the survey provides the relative level of readiness a leader possesses for leading a virtual organization and creating and sustaining successful results. Appendix A contains the Virtual Leadership Assessment Survey as well as the matrix for calculating the assessment score. The survey contains 30 questions that relate to participants' answers based on a Likert Scale of 1 to 10. Having taken the assessment, the participant is given a top-level readiness score as well as scores for the individual areas of success for the virtual organization as well as scores for the associated SPELIT factors. For example, with the row total *Retention*; the participant receives a score predictive of his/her potential for retaining virtual employees. Similarly, for the column total for *Social*; the participant receives a score predictive of his/her current capability to bring emotional and social intelligence to support virtual employees. Table 3 depicts the matrix associated with scoring readiness for leading virtually.

Table 3

Evaluation Matrix for Scoring Readiness for Virtual Leadership

	Productivity	Retention	Attendance	Development	Promotion	ROW TOTALS
Social	1.	2.	3.	4.	5.	
Political	6.	7.	8.	9.	10.	
Economic	11.	12.	13.	14.	15.	
Legal	16.	17.	18.	19.	20.	
Intercultural	21.	22.	23.	24.	25.	
Technology	26.	27.	28.	29.	30.	
COLUMN TOTALS						

The following paradigm is used for evaluating the scores.

For the subtotals of each of the rows and columns –

- 45-60 indicates a strong capacity to lead virtually
- 35-44 indicates the participant should receive some training in the associated area
- 25-34 indicates the participant should receive significant virtual leadership training and be reassessed following the training
- 0-24 indicates that the participant is most likely unsuited or not positioned to lead virtually

For the super total of all entries –

- 240-300 indicates the participant is well-suited/ well-positioned to lead virtually
- 179-239 indicates the participant should receive virtual leadership training and become better positioned in the organization before leading a virtual organization
- 0-179 indicates the participant is unlikely to have the inclination or predisposition to lead virtually.

TRAINING VIRTUAL LEADERS

Leading virtually is significantly different from leading in a face-to-face environment. While strong and positive leadership traits that make brick and mortar leaders effective are still required for virtual employees, the degree to which leaders take an active role in the virtual environment must be greater (Gladys, 2014). Virtual leaders must take greater note of the nuances embedded in their voice tone and the written word,

and be wary of social cues that exist in innuendo from a distance. Since virtual leadership presents a departure from traditional leadership practices in terms of daily in-person interface, water cooler chat, and eye contact; training in the nuances of leading virtual becomes an integral facet of creating and sustaining a successful organizational culture. Core to the training is personal leadership where the virtual leader leads with greater integrity. One of the oft-noted negative leadership behaviors among virtual leaders is not keeping commitments with respect to communications, employee development, and employee promotions. All too often, virtual leaders fall prey to not responding to virtual employees because they can simply not answer a phone or email. Personal virtual leadership training creates an awareness of the importance of strong self-leadership in an environment where it is far too easy to deviate from doing the right thing. Creating engagement, thriving relationships, and work-life balance for virtual employees are additional topics that require training. This type of training emphasizes that leaders should check-in with virtual employees frequently on a personal level, socialize the team, encourage them to share personal information, and create mentor-protégé relationships (Mulki, Nardhi, Laddek & Nanavaty-Dahl, 2009). Table 4 offers a range of course topics that support further development for virtual leaders.

Table 4

Course Topics Related to Training Virtual Leaders

Course Topics
Personal Leadership
Creating Employee Engagement in a Virtual Work Environment
Creating Working Relationships within the Virtual Work Environment

Creating an Effective Work-Life Balance in a Virtual Work Environment

Establishing Intra and Inter Organizational Support Dynamics

Leading in a Virtual Work Environment

Empowering Virtual Employees While Meeting/Exceeding Organizational Metrics

Building Trust and Empowering Employees in a Virtual Work Environment

Cross Cultural Training for a Virtual Work Environment

Facilitation Training for a Virtual Work Environment

Effective Communication in a Virtual Work Environment

Coaching, Mentoring and Employee Development for Virtual Employees

Time and Priority Management in a Virtual Work Environment

SUMMARY

While the projections for an increase in the virtual workforce worldwide vary greatly, virtually all accounts anticipate strong and continued growth trends. Most notably, the number of virtual workers is expected to grow to 1.3 billion within the next several years (Johns, & Gratton, 2013). As it is with many change initiatives, a migration to a virtual work environment carries with it a certain amount of disruption. To a large extent, managing the disruption falls to leadership who will need to analyze their organizations on social, political, economic, legal, intercultural, and technology levels; and make decided changes in the way they lead - namely the manner in which they lead their “invisible” employees.

The journey to a virtual organization will require that leadership adopt and maintain a transformational style; a style that focuses on greater care and concern for the

virtual employee. That is to say a style a style that does not fall prey to an *out of sight, out of mind mentality* towards virtual employees. The transition will necessitate a leadership style that offers work assignments and training to ensure virtual employees are not forgotten or become *digital* dust. And perhaps, equally important, the path to the virtual workspace needs leadership that inspires and motivates from afar with interest and charisma. Fundamentally, the transformation begins with organizational and leadership assessment, progresses to training focused on virtual leadership, and culminates in improved organizational performance.

In sum, the message to the reader has three parts. First, is that the process begins with a SPELIT (Schmieder-Ramirez & Mallette, 2007) analysis of the organization in terms of its social, political, economic, legal, intercultural, and technological facets in order to provide a foundation upon which to build a virtual organization. Second, is that the process includes the Virtual Leadership Assessment Survey to determine if the main component of the virtual organization, its leadership, is ready and able to meet the challenge of leading *distant* employees. And finally, that the transition process creates a focus on the element of training for virtual leaders that can bridge the gap between in-house and virtual leadership capabilities.

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APPENDIX A: THE VIRTUAL LEADERSHIP ASSESSMENT SURVEY

Virtual Leadership Assessment Survey

General Questions

- 1) Gender: M F
- 2) Current Position: _____
- 3) If applicable, number of years leading virtually: _____
- 4) If you have led or are leading virtual employees, how would you rate (on a scale of 0 to 10) the overall success of the organization? _____

Using a rating scale of 0 to 10, please rate your leadership in the virtual workspace – with 0 reflecting the lowest rating and 10 reflecting the highest rating (whole numbers only).

- 1) To what extent do you believe that trust, empowerment, and care and concern for individual virtual employees are relevant compared to those employees with whom you are collocated?
- 2) To what extent do you or would you recognize your virtual employees via feedback and recognition as compared to those employees who are collocated with you?
- 3) To what extent are you aware of the complexity and time necessary to complete projects that you do or would assign to individual virtual employees?
- 4) To what extent do you or would you exert a positive influence on the development of virtual employees by actively encouraging their development through training, leadership, and certification programs?
- 5) To what extent do you or would you interface with your virtual employees re discussing long-term plans for promotions within the organization?
- 6) To what extent do you or will you be able to plan for and/or fend off last minute assignments and data calls for your virtual employees that originate from the higher echelons of your organization?
- 7) To what extent do you or would you communicate the successes of your virtual employees to the hierarchy of your organization as compared to those employees who are collocated with you?

- 8) To what extent do you or would you influence the political forces within your organization to direct meaningful projects / assignments that you can offer to your virtual employees?
- 9) To what extent are you positioned within your organization to obtain funding for training your virtual workers?
- 10) To what extent are you politically positioned within your organization to campaign for and obtain promotions for your virtual workers?
- 11) To what extent are you economically positioned to meet the financial expenses for virtual employees?
- 12) To what extent will you be able to meet the financial expenses with retaining good virtual employees?
- 13) To what extent are you positioned to meet the costs associated with short or long term absences of virtual employees?
- 14) To what extent are you positioned to meet the financial costs associated with training virtual employees?
- 15) To what extent are you positioned to meet the costs associated with promoting virtual employees?
- 16) To what extent are you aware of ergonomic requirements of the physical setting for virtual employees?
- 17) To what extent are you aware of or trained in the elements of creating and/or dealing with a hostile working environment in a virtual organization?
- 18) To what extent are you aware of the possible misinterpretation of your communication and messaging?
- 19) To what extent are you conversant in the HR requirements for job development counseling, and designing and approving training plans for virtual employees?
- 20) To what extent will you fairly assign enriching and high-visibility projects to virtual employees?
- 21) To what extent will you use other-than-electronic communication to interface with the various cultures within your virtual organization?

- 22) To what extent are you prepared and trained to address the intra/inter cultural differences of your virtual employees relating to showing respect in the virtual setting?
- 23) To what extent do you or would you welcome and encourage creative input across all virtual employees, inclusive of divergent points of view?
- 24) To what extent do you or would you implement training programs for virtual employees that have been architected to address diversity and cultural differences?
- 25) To what extent do you or would you offer coaching and mentoring across the cultures of your virtual team?
- 26) To what extent is the technology for your virtual employees state of the art?
- 27) To what extent are you prepared to provide high-level visibility throughout the organization for virtual employees via state of the art video technology?
- 28) To what extent is the technology support for your virtual employees secure, reliable, and up to date?
- 29) To what extent is technology training available for your virtual employees?
- 30) To what extent will you cross-train your virtual employees by employing technology?

Enter values for the following questions and add the values for the rows and the columns.
Also provide a super-total for the answers to all 30 questions.

						TOTALS
	1.	2.	3.	4.	5.	
	6.	7.	8.	9.	10.	
	11.	12.	13.	14.	15.	
	16.	17.	18.	19.	20.	
	21.	22.	23.	24.	25.	
	26.	27.	28.	29.	30.	
TOTALS						

