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From the Editor

February 2020

Welcome to the 35th issue of the *International Leadership Journal,* an online, peer-reviewed journal. I want to take this opportunity to remind you to visit our new website at http://internationalleadershipjournal.com. Also, feel free to propose a topic and be a special editor of an upcoming special issue by contacting me at the e-mail below.

This issue contains one essay, three articles and one practice piece. In the essay, Howe explores a provocative question—especially considering the name and topic of this publication: Is leadership dead? He argues that "increasingly democratic, empowered, connected, interactive populations, and in contexts throughout the world" are replacing leadership, though it may rise again in smaller groups and for shorter periods of time. He welcomes your feedback on this topic—feel free to e-mail me and share your thoughts!

In the first article, Harter and Heuvel challenge the concept of *post-heroic leadership* and offer new perspectives its role within leadership studies. They argue that scholars should seek to refine the notion of heroism in leadership and present a brief case study of Admiral Lord Horatio Nelson, a classic "hero-leader," who displayed many attributes of a connective leader.

Gemechu, West, Winner, and Winston present an instrument to measure holistic ethical leadership. They used survey data from 628 participants from 13 geographical regions around the globe to develop the Holistic Ethical Leadership Questionnaire (HELQ). The simple, 23-item questionnaire measures five factors: holistic service, ethical influence, integrated competence, financial stewardship, and healthy life and has a variety of uses for both researchers and practitioners.

Ghazzawi, Lee, and Jagannathan's article attempts to shed light on how social entrepreneurship (SE) is defined and what it takes to become a social entrepreneur through an analysis of the impact on college students after engaging in social service-learning activities. Through five SE projects in the Philippines, Cambodia, and Mexico, they explored whether engaging students in activities centered on a social mission might help create a mindset that would prepare them to become future social entrepreneurs.

Finally, Kerns offers a practical operational definition for managing organizational culture and a practice-oriented framework. The framework, which integrates six dynamically interrelated action areas, is intended to help practice-minded scholars, educators, and practitioners bridge the divide between theory and the real-world practice of leadership.

Please spread the word about *ILJ* to interested academics and practitioners, who can write directly to me at jcsantora1@gmail.com.

Joseph C. Santora, EdD
Editor

ESSAY

Leadership Is Dead(?)[*]

William Howe
California Institute for Human Science

My title is intentionally provocative, especially in a journal devoted to the subject of leadership and by a scholar/practitioner/educator who has dedicated his career to that subject. It is both a declaration and a question, an aporia that represents a tension between the death of leadership in a world eager to move beyond leaders and leadership, on the one hand, and the persistence of a concept and a practice that are deeply embedded, on the other. Leadership, I might say, has died and given way to increasingly democratic, empowered, connected, interactive populations, and in contexts throughout the world. At the same time, it seems to rise as an immortal hydra because of human ego and the need for cults of personality, dictatorship, and demagoguery. What the future will make of this aporia between the death and continual rebirth of leadership remains to be seen; my guess is that the world will eventually bury leadership entirely, with only occasional rebirths within limited groups and for short periods of time.

Take me on, ye of faith; tell me that leadership is alive and well and will thrive long into the future. Legitimize this journal and salvage my career. Convince me that leadership—research, practice, education—is a burgeoning focus, is needed more than ever, and is a growing industry that partakes of an elixir of immortality. Long live leadership! Long live leaders in all sectors! Long live leadership scholars, practitioners, and educators! And long live the *International Leadership Journal* and its openness to all perspectives on leadership, including my questioning one here. Please, take me on!

In some respects, as you might guess, my title echoes Friedrich Nietzsche's comment that "God is dead," expressed in 1882 (1882/1974, Section 125).

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Nietzsche's broader context, presented as a result of the Age of Enlightenment, was "God is dead. . . . And we have killed him. . . . Must we ourselves not become gods . . . ?" Nietzsche argued again a year later in *Thus Spoke Zarathustra* (1883/1994) that "God is dead" and must be replaced by the *Ubermensch* (Overman), which is, we could say, a call for leader-like people who represent, in a long tradition beginning perhaps with Plato's "Philosopher King" in the West, special individuals who stand out "over" others and embody enlightenment and legitimate authority. So Nietzsche, in short, announced that a divine leader was dead but that humans themselves had assumed or should assume the godly role. Put otherwise, human leadership was born when theological leadership died. Despite Nietzsche's rather daunting announcement (preceded by earlier statements by Nerval, Hegel, and a few others, by the way), then, leadership seems to die in one form but to be resurrected in another.

Much the same could be said of recent scholarship wherein the authors announce the death of leadership but at the same time (and almost in sync with Mark Twain's "the reports of my death are greatly exaggerated") look to a new and improved leadership that still often focuses on the individual person as leader and, rather ironically, resurrects the kind of leadership it announces as dead.

In *Leadership is Dead,* for example, Kubicek (2011) jettisons "leadership" for "influence" and seems to move away from older top-down-command-and-control leadership, but still maintains a focus on the individual-as-leader, which he sees as entirely alive and well. Similarly, in *The Death of Leadership,* Martin (2014) argues that leaders have lost the ability to lead and have acquiesced to a mordant mindset that emphasizes political correctness and "CYA." Though his argument seems entirely sound and does suggest that such leadership is "dead," it too fails to move beyond leadership as what-the-individual-does-or-should-do, thus raising the old leadership from the very grave to which Martin wants to assign it. Finally, in a New Age-like blog post "Why Leadership is Dying," Eyre (n.d.) believes that leadership, though it hasn't yet entirely expired, is dying and being replaced by an "us" orientation that is characterized by "facilitation" and connections between "the physical and energetic worlds":

> Leadership is dying because the innate wisdom of one cannot support the needs and fulfillment of many. . . . Leadership is dying because our egos can no longer stand at the helm of the ship. . . . Scalability now has little to do with our ego's wants, and a lot more to do with what the planet and its people require of us. . . . [Today] there can be many leaders to one process, rendering leadership itself—dead. . . . Leadership is dying so that facilitation can take over. . . . We learn to co-create with the wisdom that both is, and is not of us, to create pathways that *allow us all to be leaders*. (paras. 15–24

However interesting such language may be, it points out the obvious fact that those who call for the death of leadership or suggest that leadership is dying must inevitably resort to the very language they seek to overcome—"leadership" and "leaders." Indeed, it may well be the embeddedness of the language—and the inescapability of using it while attempting to overcome it and all that it implies—that prevents leadership from expiring with any sense of finality; like a ghost perhaps, it continues to loom over the landscape of human interaction and to inform, especially in contexts such as the military (it's foolish to "facilitate" when the enemy is just over the hill), how humans conduct themselves.

But it is Kellerman's (2012) brilliant and incisive *The End of Leadership* that speaks most persuasively about the end or death of leadership as we have known it and may continue to know it. Few people have been as involved with "the leadership industry," as she calls it, than Kellerman, long a lecturer in public leadership at Harvard University's Kennedy School of Government and author of some of the "leading" books on leadership and "followership." It took enormous courage for her to write "a book that bites the hand that feeds me" and takes on "a profession in which I myself am deeply entrenched" (xiii).

Kellerman (2012) offers international perspectives in arguing these points about leadership:

- Those at the top are increasingly faced with less and less influence, while those in the middle and at the bottom have more and more influence, meaning that leadership is increasingly dispersed across wide swaths of a population.
- The spread of technology—primarily the Internet—around the globe has increasingly leveled the playing field, such that people everywhere are assuming the influence traditionally associated with leaders.

- Followers have ascended while leaders have descended or lost respect and legitimacy (Chaleff's 2009 book *The Courageous Follower*, by the way, articulates a situation in which *follower* and *leader* are nearly tautologous terms, thus obliterating any difference between the two and leaving leadership meaningless.
- Grassroots politics, citizen politics, participatory politics, community activism, and other movements are killing off leadership and rendering leaders nearly anachronistic.
- Leaders today are often disrespected, distrusted, and resisted, to the point at which they are incapable of exercising leadership.

Kellerman goes so far as to suggest that the entire leadership industry—preparation programs in companies and universities, book publishers and journals, and consultants—"could be considered a fraud" (171). And leadership itself, she says, "is in danger of becoming obsolete" (200).

Altogether, Kellerman (2012) compellingly announces "the end of leadership," though she still seems to believe, like Kubicek (2011) and Martin (2014), that leadership can be resuscitated and it can survive its death throes or take on a new incarnation. But all three scholars focus on the evolution of leadership from past to present, on its apparent demise during that evolution, and on the possibility that it can still rise, phoenix-like, out of its own ashes.

Ten years ago, I turned my attention to "the future of leadership"—will it live on or succumb to something entirely new, something "increasingly democratic, connected, and empowered?"

> In the future . . . leadership and leaders may be unnecessary and extraneous. . . . The future, with the potential for genuine sharing and interaction that can be performed with abundant technological assistance, may spell the end of leadership. For much of human history, we seem to have needed leaders and leadership processes to guide our actions and to create change. Soon, however, we may cast aside the very ideas of leaders and leadership and see them as elitist notions that were congruent only with an elitist past in which many people were marginalized and disempowered, in which mankind existed within highly constrained spaces and for limited life spans, in which man was a singular being who could not interact instantaneously with the "real" and various virtual worlds, and in which man lived amidst hierarchies rather than in a vast interconnected web. . . . Surely

> the future will put many nails in the coffin of leadership, particularly since the very present in which we live seems to sense that "leadership"—the word but also the concept and practice—may be outworn, a kind of dinosaur whose hide cannot be stretched to fit a world that is rapidly becoming increasingly democratic, connected, and empowered. . . . We may be approaching [leadership's] funeral, which in itself would perhaps signal the both of a truly empowered and enlightened mankind. (Howe, 2010, 145–146)

Have at me, whether you are a leadership scholar, practitioner, educator, student, or someone else interested in the subject. Convince me that leadership will endure, or tell me, on the contrary, that it is time to utter its eulogy and move on.

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William Howe, PhD, has been a leadership educator for 30 years and a university dean for 11 years. His principal interest has been to push the boundaries of leadership studies and to democratize the concept and practice of leadership. He has developed leadership schools, programs, and degrees. Dr. Howe earned a PhD in Educational Administration and Policy at Stanford University. At present, he serves as dean of academic affairs at California Institute for Human Science. He can be reached at William_howe@cihs.edu.

ARTICLES

New Perspectives on Heroic/Post-Heroic Leadership and on Heroic Followership*

Nathan W. Harter and Sean M. Heuvel
Christopher Newport University

This article challenges the concept of *post-heroic leadership* and offers new perspectives about the term and its role within the leadership studies discipline. It also provides insights about the origins and evolution of heroic leadership and argues that instead of post-heroic leadership, scholars should look to refine the notion of heroism in leadership and use a more fitting vocabulary. The article then closes with a brief case study of Admiral Lord Horatio Nelson, a classic "hero-leader," who upon closer examination, displayed many attributes of a connective leader.

Key words: connective leadership, heroic leadership, post-heroic leadership

Scholars and artists alike have been fascinated for centuries by the archetype of the hero. For much of this time, leaders were readily associated with heroes. To be sure, leaders are not always heroes. Nevertheless, some leaders are indeed heroic. Alexander the Great was one of the classic examples (Keegan, 1987). In recent decades, scholars have begun to question the viability of the heroic leader as a predominant paradigm in leadership studies. Some scholars have gone so far to say that Great Man theory-based heroic leadership has fallen out of favor as a leadership model (e.g., Grint, 2010; Robertson, 2017). Over the past 40 years, for example, the phrase *post-heroic leadership* has emerged. What this phrase means is unclear, partly because its authors do not always agree, but largely because it depends on what is meant by heroic leadership. *Post-heroic* as an adjective is derivative. We contend that the phrase is misleading at best and unnecessary because of the availability of alternatives.

Heroism appears to be in the eye of the beholder (Allison & Goethals, 2013; Wheeler, 1992). Different eras and cultures recognize different heroes. Nevertheless, images of the hero across time and culture have significant

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similarities, resulting in a distinct archetype or pattern. It was Campbell (1973) who popularized the idea of the hero's quest as a trope across time and culture. Nevertheless, the image of the hero can have different aspects but the same basic form. The hero archetype populates story and myth so deeply as to play an integral role in every culture, if not in the very structures of human consciousness. If the imagery is genuinely innate (Allison & Goethals, 2013), then what exactly does the phrase *post-heroic* hope to achieve? Does it mean to displace or eradicate heroism?

It is the purpose of this article to show that the phrase *post-heroic* is not only unclear, but misleading, as what people seem to be calling for is actually attributable to heroism, rightly understood. That is to say that the use of *post-heroic* in the literature on leadership is based on an impoverished understanding of heroism. We recommend abandoning the phrase altogether. Other ways of talking about this ideal, such as *connective leadership,* captures the spirit of what post-heroism was supposed to mean without rejecting the original meaning of heroism (Lipman-Blumen, 1996). If we have been successful, the phrase *post-heroic leadership* will no longer be required; what was intended by the phrase is adequately covered by connective leadership. For connective leadership, heroism is not only permissible but arguably necessary. In the same fashion, therefore, those who aspire to heroic leadership will find its culmination in connective leadership.

What Does *Post-Heroic* Mean?

We intend to show that the phrase *post-heroic leadership* has no meaning. We are not the first to make this claim (Ciulla, 2018). The phrase started to appear as long ago as 1984 (Bradford & Cohen, 1984/1997) and was introduced into the popular imagination in 1994 (Huey; Roth). By 1999, consultants had created a self-assessment and workshop training manual based on the 1997 work of Eicher (Eicher et al., 1999a, 1999b), and the phrase has been appearing ever since. This particular descriptor implies that the time for heroic leadership has passed. Alvehus (2018) suggests that heroic and post-heroic simultaneously exist (see also Latemore & Callan, 1999). Yet, *post-heroic* is defined by what no longer is. Accordingly, *post-heroic leadership* is grounded in a rejection, displacement, or transcending of something else. Some say that heroic leadership is outdated (e.g., Bradford & Cohen, 1984/1997; Krantz & Gilmore, 2018; Manz & Sims, 1991; Pearce et al., 2018). In fact, Ciulla (2018; citing Fairhurst, 2007) detects a presumption in these writings that post-heroic leadership is superior to heroic leadership. Fletcher (2004) even says so explicitly.

To reject something else is not to explain what it is. All it literally means to say *post* (as in post-modern or post-war) is that it comes after. Nevertheless, many have tried to explain it as a contrast with heroic leadership. Whatever heroic leadership is, they say, this is not that. To understand *post-heroic*, we must first understand *heroic*. Therefore, a definition of *post-heroic leadership* depends not on what *heroic leadership* means in the literature but on what one thinks that it means. We believe they are mistaken.

For some, heroic leadership is fatally gendered. Kelan and Wratil (2018) suggest that "heroic leadership has . . . traditionally been seen as a mechanism to exclude women" (8). Fletcher (2004) asserts that post-heroic leadership is more about the growth and learning of the people involved than achieving status. In other words, she hearkens back to situational leadership's distinction between being task-oriented or people-oriented—without accounting for the possibility of leadership that is both (Hersey & Blanchard, 1977). For her, task-oriented leadership is traditionally regarded as masculine; people-oriented leadership is traditionally feminine (Fletcher, 2004). Thus, she concludes that post-heroic leadership is to be associated with femininity. Post-heroic leadership is supposedly the antidote for "testosterone poisoning" (as cited in Wheeler, 1992, 1). After all, heroic leadership is described as replete with "bravado and assumed invincibility" (Fletcher, 2004, 656). Huey (1994) depicts it as men stamping their feet for emphasis and using whips and chains to get stuff done at work. Heroic leaders, he wrote, were all about ego. So heroic leadership was about being a willful, cartoonish (male) tyrant.

The question arises: in what sense is this type of leadership "heroic"? Other terms, such as coercive, authoritarian, and tyrannical leadership, already exist to label this kind of behavior. There are also what are known as "strong" leaders: despots, slave masters, and demagogues (Ciulla, 2018, 65). Furthermore, women can also be "heroic" and can lead by means of domination. It is unclear why this coercive form of leadership, which had been bruited since antiquity and examined by social science for decades, warranted treating heroism (of all things) as an epithet. As Ciulla (2018) notes, talk of post-heroic leadership simply re-casts thoughts and ideas that have been plentiful for some time in the humanities. Calling it *heroic* was unnecessary. We already had an adequate vocabulary for this.

Supposing that post-heroic leadership is not about gender, what, then, does post-heroic leadership look like? Not surprisingly, the content of post-heroic leadership has become a hodgepodge. Huey (1994) centers post-heroic leadership on setting a vision and empowering followers or delegating, quite like McGregor's Theory Y, which dates to the 1950s (Harter, 1997). It also includes decentralized authority and greater workplace diversity, Huey claims, but then he concludes by saying that post-heroic leadership is all about the same things that "always distinguished the best leaders, [namely] intelligence, commitment, energy, courage of conviction, and integrity" (para. 5). It starts to appear that post-heroic leadership means the "leadership I prefer." Fletcher (2004), Broni and Velentzas (2012), and Collinson (2018) are more abstract; they see post-heroic leadership as a shift away from a focus on the leader and toward leadership as a relationship, which is nothing new (e.g., Popper, 2004; Senge, 1990). Alternately, Fletcher (in a second position in the same article, Hosking (2006), and Collinson see it as a shift away from a focus on people and toward a focus on process. This shift resulted in a slew of new approaches to leadership that resemble one another (Alvehus, 2018; Collinson, 2018). With the variety of definitions of post-heroic, the idea of the heroic seems to have gotten lost. Or, there is an outdated emphasis on individual agency, a pale concept compared to heroism of the sort depicted by Campbell (1990).

Complicating analysis is the possibility of *heroic followership*. A hero can be both a leader and a follower. As Kelley (1988) explains, "instead of seeing the leadership role as superior to and more active than the role of the follower, we can think of them as equal but different activities" (10). Thus, this sentiment can also be applied to how both roles relate to the concept of heroism—heroic leadership is not superior to heroic followership—it is just a different *but equal* activity. While this claim may appear odd at first glance, it makes good sense once it is examined more closely. For instance, effective followers share many of the same traits as effective leaders. According to Palestini (2006), highly effective followers excel in the areas of purpose, responsibility, communication, flexibility, integrity, and sensitivity. Kelley notes that effective followers manage themselves well; are committed to the organization and a vision beyond themselves; build their competence and focus their efforts for maximum impact; and are courageous, honest, and credible. Thus, rather than being abstract and separate concepts, leadership and followership are closely interlinked in the hero's quest. If anything, as we intend to show using Campbell's (1973, 1990) work, the hero must learn to follow. What we conclude is that post-heroic leadership is an unnecessary, misleading, derivative catchall phrase of negligible academic value. That does not mean, however, that there is no such thing as heroic leadership.

The Aboriginal Hero's Quest

This section rejects the characterization of heroic leadership set forth by advocates of post-heroic leadership. Critics of heroism are setting up what the logician calls a straw man. We are not aware of anybody else who considers heroic leadership to be what they say it is. Instead, we want to offer what we call the aboriginal hero's quest as the genuine archetype.

Preliminarily, the hero may not be the only archetype associated with leadership (Latemore & Callan, 1999; see also Handy, 1996; Horvath, 2013; Moore & Gillette, 1990). Furthermore, Scheler (1987) once differentiated the hero and the leader as two separate types of exemplar with no necessary connection between them. Even the archetypal psychology on which the literature about the hero's quest is based is less about social structures or practices and more about psychological structures informed by a collective unconscious. It refers to the hero within one's psyche and that hero's emergence in the lifespan of an individual's development. Nevertheless, it accords with the ideal of heroic leadership.

The hero's quest is not about who should occupy leadership positions and how they ought to behave. It is instead that the hero's quest is for everybody in all walks of life to grow and develop toward a generative ethos (see Bolen, 1984; Pearson, 1989, both cited in Latemore & Callan, 1999; Pinkola Estés,1992). What results is less likely to be the cartoon tyrant. Turning again to archetypal psychology, if we all undertake our individual quests, we distribute everything we have been calling leadership to all men and women, whatever their job title and whatever their status, which, in turn, works against the very idea of tyranny and despotism. We need more heroes at every level of our communities, as Gardner (1993) emphasizes in his model for dispersed leadership.

We go further than this, however. The hero's quest, as it has been recounted for millennia, explains that the leader outgrows the necessity for heroism, so that on the other side of the journey, the hero lays down the questing spirit and takes up a more connected stance, rooted in the lives of others, subordinated to an encompassing dispensation by wearing what Campbell (1990) called the masks of God. For the sake of simplicity, let us split heroism into three stages or phases: (a) the self-important, yet dependent *puer* (Latin for "eternal boy"); (b) the independent, questing knight; and (c) the selfless, interdependent, and generative king or queen. Heroic leadership, in this sense, is a process that transitions toward maturity.

Campbell is the name most often associated with the mythological story of the hero's quest. In *The Hero with a Thousand Faces* (1949/1973), he set forth what he called a "monomyth"—shared by many ancient cultures that could not have influenced one another. It was his view that the monomyth originated in the unconscious in which we all participate, taking the form of local circumstances but always telling the same basic story. One must abstract from the details to see it, like a pattern; but in his comparative analysis of legend and lore, he distilled the recurring pattern and gave concrete examples from diverse traditions. Campbell did acknowledge that "there is no final system for the interpretation of myths" (329; see Jung, 1949). Nevertheless, this is a tale that has been told the world over, since time immemorial. It has a redeeming function.

Most abstractly, the journey begins from within some tension or paradox—a situation made intolerable by what we know as divergent or either/or thinking—a thinking that the hero is there to transcend, passing through the apparent conflict to discover a kind of reconciliation. This discovery alleviates the tension or resolves the paradox, making life more tolerable for everyone (Campbell, 1949/1973). The hero confronts an apparent opposition and discovers a transcendent truth, illustrating what Heraclitus had said—that God reveals himself in opposites (as cited in Kerenyi, 1959). Roughly, we might schematize the structure of these adventures as a development from (a) an encounter with some tension, for which (b) society has fashioned some superficial explanation that is plainly inadequate (and to some extent perpetuates the tension), such that (c) the hero must experience the tension fully and appreciate its depth and apparent intractability, in order to (d) transcend it altogether.

In the end, the hero-turned-benefactor must be absorbed into the energy that governs all of life. And with his passing, the community persists in its renewed state. As Campbell (1949/1973) put it, “the whole society becomes visible to itself [in the telling of the hero’s quest] as an imperishable living unit” (331). Alas, wrote Campbell, our age seems to have muddled the entire story, even as it reverberates in modern culture in poetry such as Eliot’s *Four Quartets* (1941), in novels such as Joyce’s *Finnegans Wake* (1939) , and films like *Star Wars* (1977). We now proceed without enchantment, without visions of hope—feeling bereft and we don’t even know why. Or we confound our heroes with gods, like super heroes with divine powers. As Kerényi (1959) points out, the ancients paid tribute to heroes but exalted the gods. Even the altars were different, as altars to heroes meant you should turn your head downward and let the blood flow downward, toward the underworld, as a hero’s life is poured out, whereas altars to the gods meant you should lift your face and hands upward and let the flames carry the entirety of one’s sacrifice upward toward the heavens (Kerényi, 1959). Heroes are not gods. They manifest God. That is something different (Kerényi, 1959).

Sadly, we have blurred the two. Critics of heroic leadership seek a way out. Thus, we require a fresh adaptation that will resonate because it accords with our deepest psychic structures. The hero is one who enters the wild and returns reconciled to it, saying to an anxious populace, *peace, be still*. Even in our passing away, the saga continues. For the gods are among us. We embody them, and we will return to them. Nevertheless, they want to be a part of our continuity by living out this quest in the lives of our youth, repeatedly, to the end of time. The next section gives a brief history of the ideal.

Origins of the Heroic Leader

Those who have written about leadership through the ages have been groping toward something equivalent to the hero's quest, toward an image of leaders as extraordinary. What sets leaders apart? How do we identify them? How do we learn from their example? Great minds have tried to make sense of the phenomenon of leadership (Cawthon, 2002; Rejai & Phillips, 2002). We might think of these efforts as a process of conceptualizing the myth, giving their investigations a more analytical cast.

To understand the origins of the heroic leader, one must delve back to antiquity, as the earliest reflections on leadership appeared during the emergence of civilization itself (Bass, 1990; Cawthon, 2002; Couto, 2004). The ancient Egyptians broached the subject over 5,000 years ago by developing hieroglyphics for leadership (*seshemet*), leader (*seshemu*), and follower (*shemsu*), which can still be found in the pyramids today (Bass, 1990). The ancient Greeks followed suit by chronicling concepts of leadership that were exemplified by the heroes in Homer's *Iliad* (Bass, 1990; see Rejai & Phillips, 2002). Ajax symbolized inspirational leadership and law and order, while Agamemnon displayed justice and judgment (Bass, 1990). Meanwhile, Nestor represented wisdom and counsel, Odysseus demonstrated shrewdness and cunning, and Achilles modeled valor and activism (Bass, 1990). To the ancient Greeks, these values typified the ideal of a heroic leader.

In later generations, Greek philosophers such as Plato examined the requirements for the ideal leader of the ideal state in the *Republic* (c. 375 BC), attempting to determine the crucial ingredients for the "philosopher king" (Bass, 1990; for a synopsis of Plato's political philosophy, see Strauss, 1987b).

Meanwhile, Plato's most gifted student, Aristotle, was concerned about the lack of virtue in those who aspired to leadership and argued for the need to educate such youth for leadership in *Politics* (Bass, 1990; for a synopsis of Aristotle's political philosophy, see Lord, 1987). Not surprisingly, it was the ancient Greeks who first developed the concept of *heroic leadership,* as *hero* is a Greek word referring to a person of superhuman strength, fearlessness, and integrity who was favored by the gods (Remmé et al., 2008). Romans continued this legacy in later generations through the veneration of their hero and god, Hercules (Grafton et al., 2013). However, this early interest in heroic leaders was not limited only to the Western world. In many ways, it was just as relevant to the likes of Asoka and Confucius as it was to Plato and Aristotle (Bass, 1990). For instance, the Chinese classics, dating back to the sixth century BC, consistently reminded the country's leaders of their duties to the people (Bass, 1990). Such messaging continued through Lao Tzu's *Tao Te Ching* (c. 500 BC/1962), which taught the importance of wisdom and responsibility in leadership (Heider, 1997). What these various thinkers were doing was turning stories about heroism into a study for real-world applicability.

As the centuries progressed, religious clerics and philosophers alike continued to write about heroic leaders and used them to help build the world around them. Myths and legends about great leaders were integral in the development of civilized societies (Bass, 1990). They were often used to provide plausible and acceptable explanations for the dominance of leaders over subordinates (Bass, 1990). Further, as the ideas about heroic leaders evolved, concepts such as pragmatism took on great importance. For instance, in *The Prince* (1513), Machiavelli argues that leaders need steadiness, firmness, and concern for the maintenance of power to run a government effectively (Bass, 1990). Moreover, Machiavelli believed that while it was optimal for leaders to achieve such objectives while maintaining the esteem of the populace, less savory methods such as treachery and deceit could be necessary (Bass, 1990; for a synopsis of Machiavelli's political philosophy, see generally Strauss, 1987a). Later, Hegel took a loftier view of heroic leadership in his 1830 work *Philosophy of the Mind* (1830/1971) by arguing that by first serving as a follower, a leader subsequently can best serve his or her followers (Bass, 1990; for a synopsis of Hegel's political philosophy, see Hassner, 1987). Hegel believed that such a mindset was essential for effective leadership (Bass, 1990). Machiavelli and Hegel are simply representative samples in the ongoing domestication of a myth.

Culminating from these earlier influences, Carlyle's (1841/1966) writings on the *Hero as King* arguably laid the most significant groundwork for our modern understanding of the heroic leader. Carlyle portrays the heroic leader as the noblest of the noble, noting that "he is practically the summary for us of *all* the various figures of heroism; priest, teacher, whatsoever of earthly or of spiritual dignity we can fancy to reside in a man, embodies itself here, to *command* over us, to furnish us with constant practical teaching, to tell us for the day and hour what we are to *do*" (Carlyle, 1841/1902, 225). Carlyle (1841/1902) also asserts that it is society's mission to find the ablest man (or woman) to be groomed for the mantle of leadership, for without it nothing else—ranging from laws to speeches to revolutions—would really matter.

Burns (1978) developed one of the first modern, scholarly definitions for *heroic leadership*. According to Burns (1978), it meant:

> belief in leaders because of their personage alone, aside from their tested capacities, experience, or stand on issues; faith in the leaders' capacity to overcome obstacles and crises; mass support for such leaders expressed directly—through votes, applause, letters, shaking hands—rather than through intermediaries or institutions. (244)

Further, Burns (1978) notes that heroic leadership is "not simply a quality or entity possessed by someone; it is a *type of relationship* between leader and led" (244). Generally, such leadership appears in societies that are either undergoing profound crisis or societies that are in development or transition (Burns, 1978). In such situations, a crisis in trust and legitimacy has overwhelmed the existing leadership system, and new heroic leaders emerge who offer the rare gifts of not only compassion and competence, but also vision (Burns, 1978).

Morris and Schwartz (1993) attempt to define *heroic leadership* with a different emphasis, as "a form of domination that evokes reverential sentiments in the context of fateful enterprises, campaigns, and social movements" (134). Echoing

Burns (1978), they assert that heroic leaders generally arise during times of crisis, even going so far as to argue that "greatness is predicated on crisis" (Morris & Schwartz, 1993, 137). In turn, this built upon Carlyle's (1841/1966) sentiments on heroic leadership, that times of "disbelief, distress, and perplexity [are like] dry dead fuel, waiting for the lightning out of Heaven that shall kindle it. The great man, with his free force directly out of God's hand, is the lightning" (13). In responding to such crises, heroic leaders are not revered because they possess authority or valued qualities, but rather because they use them to mobilize people to engage strenuously in protecting or changing cultural values and institutional structures (Schwartz, 1983).

As leadership theorists try to find a more academic way to capture this idea of heroic leadership, it would help our understanding to consider a concrete example—a real-world embodiment from modern times, not a myth shrouded in the distant past.

An Exemplar of Heroic Leadership

The question arises: what figures from history or literature exemplify heroic leadership or heroic followership—not in a simplistic, cartoonish fashion, but with more nuance, perhaps displaying connective leadership. We have selected one brief example for purposes of illustration.

In Great Britain, Admiral Lord Horatio Nelson (1758–1805) remains among the foremost of heroic leaders and is arguably considered one of his nation's greatest military leaders (Grint, 2004). This is largely because in the view of many, he personified all the critical elements of a heroic leader (Grint, 2004). First, he arose in a time of crisis, during Britain's monumental struggle against revolutionary and Napoleonic France. Fears of Napoleon invading the British Isles abounded, and as Nelson's standing with the public was so great, the British Admiralty (who were wary of what they viewed as Nelson's excessive daring and risk-taking) had little choice but to put him in command (Grint, 2004). Also, Nelson was extraordinarily brave and always led from the front. The "combination of his personal courage and heroic fatalism instilled in Nelson a confidence that others lacked, and a taste for risk taking that others avoided" (Grint, 2004, 1082). Nelson also surrounded himself with top people—his "band of brothers"—who were also outstanding leaders. Instead of micromanaging these individuals, he gave them the authority, guidance, and space to make important command decisions on their own.

According to Grint (2004), "a great part of Nelson's leadership skill was in recognizing and aligning the particular skills and competencies of his followers with organizational tactics that made the most of those skills and competences" (1080). This practice cultivated an immensely loyal band of followers who propelled Nelson's legendary reputation and image further. Using the collective knowledge and individual initiative from this group, Nelson was able to lead them to a series of spectacular victories at Cape St. Vincent (1797), the Nile (1798), and finally Trafalgar (1805), where Nelson met his heroic demise (Grint, 2004). It also did not hurt that Nelson was a master of media relations and ensured that the British public was always made aware of his victories and adventures (Grint, 2004). Thus, an examination of Nelson's career provides some important insights as to what crucial ingredients are necessary to develop a heroic leader. However, as Grint (2004) notes, "his case [also] demonstrates the complexity of leadership—and thus shows how difficult heroic leadership is to reproduce or emulate" (1080).

While Nelson is depicted here as the stereotypical heroic leader, a close look at his career also reveals signs of Nelson as a connecting leader. According to Hore (2015), "Nelson was the first to recognize that his astounding achievements at sea and in battle were only possible through the part played by his officers and men, and especially his fellow captains" (viii). Thus, he focused much of his effort on bringing out the best from people under his command, and they, in turn, would resolve to never fail him (Hore, 2015). According to Hore, "this group formed an elite, so much so that when Lord Barham, First Lord of the Admiralty in 1805, invited Nelson to choose his captains, Nelson is alleged to have replied, 'Choose yourself, my lord. The same spirit actuates the whole profession; you cannot choose wrong'" (viii). This exchange reveals that while Nelson was certainly recognized as a heroic leader, he also realized that he was part of a larger leadership system, where many leaders and followers worked together in an effort to accomplish a common good (Kellerman, 2016).

Conclusion

The idea of *post-heroic leadership* emerged as a response to a needlessly simplified image of leadership, where the focus had been on the leader alone and on what made him or her exemplary. In recent years, similar attempts to widen the aperture to include the consideration of followers and the context in which leadership takes place have also been introduced into the literature, so that today we possess a range of equivalent concepts.

Ultimately, the phrase *post-heroic* turns out to have been regrettable, as it relies on an impoverished image of heroism. The enduring archetype of the hero actually calls for increasing connectivity, integrating the leader into a community of purpose. We conclude that the phrase *post-heroic* ought to be retired in deference to better alternatives. As a consequence, those who are calling for more connected leadership can draw from a rich literature on the hero's quest. If more of us were to undertake that adventure, we should find ourselves on our shared pathways more connected, which we understand to have been the underlying motive for the extant literature on post-heroic leadership.

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Nathan W. Harter, JD, has taught leadership for 30 years, with a term as chair of the scholarship section of the International Leadership Association. Presently, he serves as professor at Christopher Newport University in Virginia. Along with numerous articles, book chapters, and presentations, Professor Harter's fourth book on the topic is presently under review. He can be reached at nathan.harter@cnu.edu.

Sean M. Heuvel, PhD, is an assistant professor of leadership studies at Christopher Newport University in Newport News, Virginia. He holds a BA, MEd and PhD from the College of William and Mary and an MA from the University of Richmond. Dr. Heuvel has published several books, articles, and book chapters on multiple leadership and history-based topics. He can be reached at sheuvel@cnu.edu.

Creating an Instrument to Measure Holistic Ethical Leadership*

Tariku Fufa Gemechu
Regent University

George R. "Bud" West
Central Philippine University

William Dave Winner and Bruce E. Winston
Regent University

The purpose of this study was to create an instrument to measure holistic ethical leadership. We followed DeVellis' (2017) scale development method. From the literature review, we found 224 items for the item pool. Two rounds of review by a panel of experts reduced the number to 81 items. We used survey data from 628 participants from 13 geographical regions around the globe. Principle component analysis resulted in five factors with eigenvalues greater than 1.0. Optimization of the factors resulted in 4 five-item scales with Cronbach's alphas of 0.93, 0.92, 0.88, 0.87, and one three-item scale with a Cronbach's alpha of .74. We tested the instrument for concurrent and discriminant validity and test-retest reliability and found the scales both valid and reliable.

Key words: ethical leadership, holistic ethical leadership questionnaire, holistic leadership

The Holistic Ethical Leadership Questionnaire (HELQ) is a scientifically validated and reliable instrument that measures the construct of *holistic ethical leadership,* which we define as an ethical influence process that brings about a physical, spiritual, mental, emotional, social, psychological, and financial sense of wholeness to oneself and others. Thus, the HELQ is unique and distinguished from other instruments of ethical leadership because it measures the holistic and ethical aspect of leadership in one construct, while other instruments of ethical leadership singularly measure ethical aspects of leadership.

The construct of holistic ethical leadership and a scientifically validated instrument to measure it failed to exist as a single construct (Best, 2011; Johnson, 2018), but were instead scattered through disintegrated theories of holistic leadership and ethical leadership (Winston & Patterson, 2006). Few studies (e.g.,

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Dhiman, 2017; Hatala & Hatala, 2004) explored holistic leadership with various instruments that measure its components. Similarly, few studies (Brown et al., 2005; Johnson, 2018) explored ethical leadership and its measurement.

It is hoped that the statistically validated and reliable HELQ contributes to the knowledge base and helps advance the theory of holistic ethical leadership in academia. Additionally, practitioners may use the HELQ in measuring the perception of holistic ethical leadership traits in leaders. The overall use of the HELQ will contribute to organizational effectiveness by developing healthy, competent, mature, resilient, and holistic ethical leaders.

Best (2011) defines *holistic leadership* "as a values-based approach to producing optimal outcomes through the collaborative development of all participants in the process, at all levels of functional performance" (60). Best determined via a qualitative study that holistic leadership uses a value-based approach focused on the welfare of individuals, groups, organizations, and the larger community. Best further posits that holistic leaders take personal responsibility for leading themselves well and stewarding others in a manner that ensures wise use of resources, adds value to followers, and develops the organization they lead. Lussier and Achua (2007, as cited in Best, 2011) posit that stewardship in the context of holistic leadership is "an employee-focused form of leadership that empowers followers to make decisions and have control over their jobs" (61). According to Best, holistic leaders lead from a stewardship point of view in a manner that brings holistic development to oneself and followers, facilitating an environment for individual, group, and organizational transformation.

Kiruhi (2013) conducted a qualitative research study that sought to identify exemplary leadership in Africa that would serve as a holistic leadership development framework. Kiruhi states that "an exemplary leader is one who has influenced the thoughts, feelings, and behaviors of a significant number of people" (vii), and he proposes four dimensions of leadership development that would make a leader holistic: (a) cognitive, (b) affective, (c) psychomotor, and (d) spiritual dimensions that bring a sense of wholeness to a leader. These four dimensions are relevant to this study because they explain that leaders have mental, emotional, physical, and spiritual dimensions that constitute the total person and give a sense of wholeness to a leader.

Hatala and Hatala (2004) challenge readers to become better leaders for themselves and others by integrating the personal, interpersonal and organizational aspects of individual, group, and organizational life. They note that anyone can become a successful leader and lead others to success provided that he or she intentionally work on integrating and using the personal intelligence that is bestowed in oneself and others around them. Hatala and Hatala's integrative leadership concept is relevant to the holistic leadership concept in this study because it provides more insight into the dimensions of individual, group, and organizational life that need to be integrated to bring a sense of wholeness.

Treviño at al. (2000) indicate that ethical leadership rests itself on "perceptions of a leader as both a moral person and a moral manager" (128). They posit that a moral person: (a) carries traits of integrity, honesty, and trustworthiness; (b) demonstrates behaviors of doing the right thing, showing concern for people, being open, and having personal morality; and (c) while making decisions, holds to values, remains objective and fair, shows concern for society, and follows ethical rules. According to Treviño at al., as moral managers, ethical leaders (a) role model through visible action; (b) reward and discipline; and (c) communicate about ethics and values. They argue that "being an ethical leader requires developing a reputation for ethical leadership. Developing a reputation for ethical leadership depends upon how others perceive the leader on two dimensions: as a moral person and as a moral manager" (141).

Ciulla (2014) highlights three general areas of leadership ethics: (a) the ethics of the means—looking at the ethical influence processes leaders use to reach goals; (b) the ethics of the person—looking at the leader as a moral person; and (c) the ethics of the ends—looking at how good and right the outcomes are; and what ethical worth the results entail. Her work applies to the current study because it presents the ethics of means, the ethics of the person, and the ethics of the ends in helping to understand ethics as the distinguishing factor between right and wrong, or good and evil, of human values, actions, and behaviors.

Starratt (2004) reviewed the empirical literature and drew on his vast experience as an educator at various American universities to explain ethical values and practices that educational leadership should consider. Starratt posits that ethical leadership is composed of: (a) becoming a moral person and moral leader; (b) taking responsibility for self, others, and mission welfare; (c) providing authenticity of values and behaviors; (d) being a presence in people's life to affirm, critique, and enable them; and (e) multiplying virtues. The ethical values that Starratt raises shed more light on the nature of ethical leadership in the current study.

Fluker (2009) developed a model of ethical leadership that revolves around (a) personal character, (b) societal civility, and (c) spiritual community. He posits that ethical leadership addresses the interrelated dimensions of human life—self, social, and spiritual—by dealing with the questions of identity and purpose, relationship with the other, and the human need for a sense of ultimacy, excellence, and hope. This concept is relevant to this study as it gives insight into various dimensions of human life. Fluker states that 21st century leaders need to integrate the various dimensions of individual, group, and organizational lives that shape overcoming challenges and seizing opportunities to their advantage. According to Fluker, ethical leaders pay attention to various dimensions of their own life to form character, civility, and a sense of community. Fluker cautions that when leaders fail to recognize and meet the multidimensional needs of their own lives in an ethical manner, they can endanger personal effectiveness, jeopardize the mission of a team, and put their organization in a difficult position.

Hatcher (2002) provides insights on advancing ethics in organizations and its multifaceted benefits for societies. Hatcher's work applies to the current study because it explains the benefits of applying ethical leadership in organizations. Hatcher explains how human resource development (HRD) departments exert ethical influence by writing ethical codes of conduct, fostering ethical practices within organizations, and transforming their organizations into responsible corporate citizens. Hatcher argues that ethical leadership assumes social responsibility as HRD departments foster the application of formal codes of ethics across their organization. According to Hatcher, when top organizational leaders are committed to the practice of ethical leadership, the application at middle and lower levels becomes strong since ethical leadership is about the leader's heart, comprised of internal values, character, integrity, honesty, trustworthiness, and faithfulness, which have the power to inspire others, and effect real transformations.

Brown and Treviño's (2006) metanalytic study on ethics and leadership subjects contributes to the current study as it brings in a better understanding of ethical leadership's similarities and differences with other leadership constructs. Brown and Treviño found that ethical leadership theory embraces and covers spiritual leadership (Fry, 2003), authentic leadership (Avolio et al., 2004; Walumbwa et al., 2008) and transformational leadership (Burns, 1978) because the theories explain the moral aspects of leadership values and praxis. Brown and Treviño posit that the theory of servant leadership partially overlaps with ethical leadership.

Benefits of ethical leadership to individuals, groups, and organizations include improved job performance, job satisfaction, employee motivation, and affective commitment (Judge et al., 1997; Mayer et al., 2012). Ethical leadership "reduces employee absenteeism, misconduct and improves job satisfaction and performance" (Cheteni & Shindika, 2017, 3). It promotes organizational citizenship behavior, as employees who work with ethical leaders are motivated to go beyond their duty and produce more (Bandura, 1977). It enhances leader–member exchange between followers and leaders (Graen & Uhl-Bien, 1995) and facilitates environments of trust, honesty, fairness, employees' consideration, and leaders' charisma (Treviño et al., 2000). Ethical leadership improves individual, groups, and organizational communications (Kim et al., 2015). It contributes to making better choices, which leads to better decision making (Northouse, 2016), encourages the responsible use of power (Nygaard et al., 2017, and improves service quality (Nygaard et al., 2017). Ethical leadership encourages creativity by laying the foundations for desiring transformational initiatives, rendering selfless service, and upholding authenticity (Walumbwa et al., 2008). It reduces organizational deviance (Mayer et al., 2012) and provides role models, good examples, and good shepherds to emulate (Nygaard et al., 2017).

We operationalized holistic ethical leadership based on the discussions on holistic leadership and ethical leadership in the extant literature. In this study, we define *holistic ethical leadership theory* as an ethical influence process that brings about a physical, spiritual, mental, emotional, social, psychological, and financial sense of wholeness to oneself and others.

Purpose of the Study

The purpose of this study is to build on the work of Best (2011), Kiruhi (2013), Treviño et al. (2000), and Ciulla (2014) to create an instrument to measure holistic ethical leadership to help researchers measure the concept. Participants came from 13 regions around the globe (see Table 1). Participants were 40% female, and there was a reasonable diversity of ages.

Table 1: Geographical Region, Gender, and Age of the Participants

	N	Percent
Area		
Central and Eastern Europe	72	11.5
East Asia Opportunities	13	2.1
East Asia Orient	16	2.5
Francophone Africa	31	4.9
Latin America and the Caribbean	35	5.6
NAME (North Africa & Middle East)	24	3.8
PACT (Persia, Armenia, Central Asia & Turkey)	10	1.6
South Asia	21	3.3
Southeast Asia	20	3.2
Southern and Eastern Africa	154	24.5
U.S., Canada & Oceania	163	26.0
West Africa	48	7.6
Western Europe	21	3.3
Gender		
Female	252	40.1
Male	376	59.9
Age		
18–30	112	17.8
30–40	162	25.8
40–50	170	27.1
50–60	113	18.0
60–90	71	11.3

Note: *N* = 628

The diversity of geographical regions was intentional in that we wanted to create an instrument that had applicability in multiple cultures. The lead author secured permission to contact employees in a multinational organization with offices in each of the 13 regions. The instrument used American English.

Method

We followed DeVellis's (2017) eight-step method of scale development. We created a pool of 224 items from literature about ethical and holistic leadership style and development. We asked an expert panel of three leadership researchers to review and recommend keeping, editing, or deleting items. The expert panel's review reduced the item pool to 117 items.

We used a seven-point scale for the items, where 7 = always and 1 = never. DeVellis (2017) states that scales, composed of items that can be scored on a continuum, are highly compatible for measuring values, attitudes, behaviors, and attributes that people espouse and demonstrate.

We asked the expert panel for another review of the 117 items, and the panel recommended removing another 36 items leaving the item pool at 81 items. The 81 items were sent to the participants via an online survey service. We received 628 responses. We conducted a Pearson *r* correlation and noted the high number of correlations above 0.50, so we used direct oblimin rotation as Brown (2009) suggests. We also used SPSS Statistics software to determine the Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy and Bartlett's test of sphericity. The results, shown in Table 2, indicated that the data was a good candidate for data reduction, per Hair et al.'s (2010) recommendation of KMO above .60 and Bartlett's test of sphericity p-value < .05.

Table 2: KMO and Bartlett's Test for the Initial 81 Items

Test	Score
KMO measure of sampling adequacy	.987
Bartlett's test of sphericity	
Approx. chi-square	51,581.8
df	3,240
Sig.	.000

We used SPSS to run a principle component analysis that produced seven factors with eigenvalues above 1.00, and it collectively explained 68.5% of the variance. We used a minimum factor loading of 0.4. Of the 81 items, 37 were removed due to cross-loading (Hair et al., 2010), having a factor load of less than 0.4, or comprising a factor of less than three items (Hair et al., 2010). This left 44 items.

We ran the factor analysis again on the 44 items that produced KMO and Bartlett's test of sphericity that indicated the data was also suitable for data reduction (Hair et al., 2010). The results are shown in Table 3.

Table 3: KMO and Bartlett's Test for the Reduced 44 Items

Test	Score
KMO measure of sampling adequacy	.982
Bartlett's test of sphericity	
Approx. X^2	26,584.122
df	946
Sig.	.000

The factor analysis revealed a five-factor analysis with eigenvalues greater than 1.0 and no cross-loading. One item did not have a factor loading greater than 0.4. Factor 1, which we named holistic service, had six items and a Cronbach's alpha of .94; Factor 2, which we named ethical influence, had 14 items and a Cronbach's alpha of .96; Factor 3, which we named integrated competence, had 14 items and a Cronbach's alpha of .96; Factor 4, which we named financial stewardship, had three items and a Cronbach's alpha of .74; and Factor 5, which we named healthy life, had six items and a Cronbach's alpha of .89.

According to Devellis's (2017) guidance for optimizing scales, if a scale has a high Cronbach's alpha as we had in Factors 1, 2, 3, and 5, we could reduce the number of items. We chose to retain the five highest item-factor load items in each factor. We did not reduce the items for Factor 4 due to the lower Cronbach's alpha. We ran another principle component analysis of the 23 items. The KMO and Bartlett's test of sphericity, shown in Table 4, still supported the use of data reduction. The output from the final principal component analysis showed that 70% of the variance is explained by the five factors.

Table 4: KMO and Bartlett's Test for Final 23-Item Five-Factor Instrument

Test	Score
KMO measure of sampling adequacy	.971
Bartlett's test of sphericity	
Approx. X^2	11,287.444
df	253
Sig.	.000

The factor names, Chronbach's alphas, and items are shown in Table 5.

Table 5: Holistic Ethical Leadership Questionnaire

Construct	Alpha	Item
Holistic Service	.93	1. My boss serves others.
		2. My boss perceives other's feelings and needs.
		3. My boss shows concern and acts with care.
		4. My boss is encouraged by agapao love (a moral love) to meet emotional needs.
		5. My boss cares about health and wellbeing of organizational members.
Ethical Influence	.92	6. My boss is perceived as a moral person who embodies traits of integrity, honesty, and trustworthiness.
		7. My boss displays strong moral character.
		8. My boss applies ethical thinking.
		9. My boss does what is right, no matter the cost.
		10. My boss promotes behaviors of honesty, trustworthiness, fairness, and care when making decisions.
Integrated Competence	.88	11. My boss articulates the organizational vision clearly.
		12. My boss practices creative thinking.
		13. My boss inspires hope.
		14. My boss equips for personal, interpersonal, organizational, and societal successes.
		15. My boss is self-aware.
Financial Stewardship	.74	16. My boss communicates the importance of having a job as it provides wages and salaries.
		17. My boss encourages saving of money.
		18. My boss is motivated by agapao love (a moral love) to meet physical needs.
Healthy Life	.87	19. My boss values sleep because it contributes to physical well-being.
		20. My boss understands the benefits of rest to physical health.
		21. My boss facilitates opportunities to rest.
		22. My boss regulates personal emotions.
		23. My boss believes he or she has inherent value and significance by virtue of being a human being.

We used SPSS to measure the minimum, maximum, mean, standard deviation, skewness, and kurtosis of the five factors. The results are shown in Table 6. Kim

(2013) posits that a measure of skewness describes the asymmetry of "the distribution of a variable" and a measure of kurtosis describes the "peakedness of a distribution of a variable" (52). Kim indicates that "an absolute skew value larger than 2 or an absolute kurtosis (proper) larger than 7 may be used as reference values for determining substantial non-normality" (53). As Table 6 shows, the data has a skew measure of less than 2 and a kurtosis measure of less than 7. This means the data has a normal distribution (is parametric).

Table 6: Descriptive With Skewness and Kurtosis Test for the Final Five-Factor Instrument

	Min	Max	*M*	*SD*	Skewness	*SE*	Kurtosis	*SE*
Holistic Service	1.3	7.0	5.5	1.19	-1.03	.10	.65	.20
Ethical Influence	2.0	7.0	5.9	1.06	-1.34	.10	1.43	.20
Integrated Competence	1.3	7.0	5.5	1.11	-.99	.10	.47	.20
Financial Stewardship	1.0	7.0	5.2	1.19	-.69	.10	.23	.20
Healthy Life	1.5	7.0	5.5	1.10	-.98	.10	.53	.20

Note. N = 628.

Thus, the Pearson correlation was used to see if there were correlations among the five new factors with the 23 items (see Table 7). Results showed that there is a strong correlation between the factors and that all correlations are statistically significant at the .01 level.

Table 7: Pearson Test for the Items of the Final Five-Factor Instrument

	Holistic Service	Ethical Influence	Integrated Competence	Financial Stewardship	Healthy Life
Holistic Service					
Ethical Influence	.78**				
Integrated Competence	.81**	.76**			
Financial Stewardship	.69**	.61**	.63**		
Healthy Life	.78**	.73**	.74**	.62**	

**Correlation is significant at the .01 level (2-tailed).
Note. N = 628

Validity and Test-Retest Reliability

We then used the five-factor instrument and asked the participants to take the new 23-item five-factor instrument, along with the Essential Servant Leadership Behavior scale (Winston & Fields, 2015) and the Big-Five Extraversion scale (John & Srivastava, 1999). Face validity came from the use of theoretical research literature and the expert panel review. Concurrent and discriminant validity came from correlation analysis of the five factors of the holistic ethical leadership scales with the Essential Servant Leadership Behavior scale and the extraversion scale respectfully. Eighty-one participants provided data for the concurrent and discriminant validity as well as for the test-retest reliability. The five scales of the holistic ethical leadership measure significantly correlated (all correlations above 0.6 and *p*-values = .01 with the Essential Servant Leadership Behavior scale showing concurrent validity (Minor et al., 2017). However, the five scales of the holistic ethical leadership measure did not significantly correlate with the extraversion scale, thus showing discriminant validity (Minor et al., 2017). Once the validity tests were completed, we analyzed test-retest reliability. According to Cozby and Bates (2014), "test-retest reliability is assessed by measuring the same individuals at two points in time" (102). The test-retest reliability enables researchers to determine if the same individuals say the same thing when asked at two different times. The correlation that exists between the two responses of the same individuals establishes test-retest reliability, even though "It is difficult to say how high the correlation should be before we accept the measure as reliable, but for most measures the reliability coefficient should probably be at least .80" (Cozby & Bates, 2014, 102). In the process of doing test-retest reliability, we asked_the participants to provide us with their e-mail addresses and to retake the holistic ethical leadership measure two weeks after the first validity data collection so that we could conduct test-retest reliability. The paired samples correlation showed high correlations (above .60 with *p*-values = .000), and the paired samples *t*-tests were all insignificant, with *p*-values ranging from .10 to .71. Thus, the results show test-retest reliability (Minor et al., 2017).

Discussion

The purpose of this study was to create a valid and reliable instrument to measure holistic ethical leadership. The concept of holistic ethical leadership was operationalized, and the HELQ, a statistically validated instrument was created to measure the construct. Prior to this study, there was no instrument to measure holistic ethical leadership, though scales to measure ethical leadership exist (Brown et al., 2005).

Implications of Research

The HELQ enables researchers to measure *holistic ethical leadership*—an ethical influence process that brings about a physical, spiritual, mental, emotional, social, psychological, and financial sense of wholeness to oneself and others. Thus, the development of such an instrument opens more doors for empirical research. The HELQ has significance to the practitioner as well. First, the study could be used for the personal development of individuals (Gilley et al., 2002). Second, the study contributes to the leadership development of individuals and leaders through 360-degree performance ratings (DeVito, 2012). This simple 23-item questionnaire can be included in a 360-degree evaluation of individuals, followers, and leaders to identify holistic ethical leadership attributes and characteristics within their organization. Third, the study can be used for coaching organizational members once the need for holistic ethical leadership traits, attributes, and practices are identified (Knowles et al., 2015). Fourth, the results of the current study could be used for mentoring organizational members toward the desired holistic ethical leadership values and behaviors (Knowles et al., 2015). Biehl (1996) explains that coaches mainly draw solutions out of people while mentors pour in from their experiences. Thus, mentors could help organizational members grow and keep growing by helping them commit to developing values and demonstrating behaviors of holistic ethical leadership within the organization. Mentoring is generally about people helping other people realize and maximize their potential. As a result, organizational effectiveness and job performance may be enhanced by developing healthy, competent, mature, resilient and holistic ethical leaders.

Conclusion

From 13 geographic areas of the world covering North America, Latin America, Europe, Asia, Australia, and Africa, 628 participants submitted responses via an online survey service. Principal component analysis was performed, and a five-factor instrument emerged that accounted for 70% of the variance. The five factors were labeled holistic service, ethical influence, integrated competence, financial stewardship, and healthy life. The five factors had high reliability. The final 23-item, five-factor instrument is labeled as the Holistic Ethical Leadership Questionnaire (HELQ). The HELQ provides scholars and researchers with a valid, and reliable instrument for future research related to holistic ethical leadership, while encouraging practitioners for personal development, leadership development, and coaching and mentoring of organizational members for valuing and practicing holistic ethical leadership within organizations and beyond. Further research is recommended to develop and further the construct of holistic ethical leadership and to create a tool for individual self-assessment.

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Tariku Fufa Gemechu, PhD, is from Ethiopia and holds a PhD in Organizational Leadership from Regent University. He teaches master-level classes as adjunct faculty at Africa Leadership and Management Academy (ALMA) in Zimbabwe. He also serves as adjunct faculty at the Global Academy for Transformational Leadership (GATL), based in Orlando, Florida. His research interests include ethical leadership, holistic leadership, human resource development and organizational effectiveness. He can be reached at tarigem@mail.regent.edu.

George R. “Bud” West, PhD, serves Central Philippine University as a professor in the School of Graduate Studies and in the University Research Center. His research interests include the ontology of leadership, the dynamics of social power in interpersonal relationships, and cross-cultural characteristics of organizational behavior as applied in developing countries. He can be reached at gr.west@cpu.edu.ph.

William Dave Winner, PhD, is a consultant with The Center in Souderton, Pennsylvania. He is also an adjunct professor at Regent University for the School of Business and

Leadership. He holds a PhD in Organizational Leadership with a concentration in Human Resource Development. His research interests include self-directed leadership, adult learning, and organizational diagnosis and assessment. He can be reached at willwin@regent.edu.

Bruce E. Winston, PhD, is a professor of business and leadership for Regent University's School of Business and Leadership. In addition, he is the program director for Regent's PhD in Organizational Leadership program. His research interests include person–job fit, person–organization fit, organizational performance, and servant leadership. He can be reached at bwinston@regent.edu.

Preparing College Students to Become Future Leaders Through the Power of Social Entrepreneurship*

Issam Ghazzawi, Byungku Lee, and Christine Jagannathan
University of La Verne

As the concept of social entrepreneurship (SE) gains popularity worldwide, it has raised interest among scholars to study this socially embedded entrepreneurial phenomenon. This article attempts to shed light on how SE is defined and what it takes to become a social entrepreneur through an analysis of the impact on college students after engaging in social service-learning activities. Through social entrepreneurship projects for the local community or people in the Philippines, Cambodia, and Mexico, this article sought to elicit whether engaging students in activities centered on a social mission might help create a mindset that would prepare them to become future social entrepreneurs.

Key words: demographic transition theory, environmental sustainability, marine pollution, obesity, poverty, social entrepreneurship, social responsibility

The fast-paced development of society for the last several decades has produced a number of social issues that have not been successfully dealt with by the established social entities such as governments, businesses, or not-for-profit organizations. A growing number of societal problems, such as poverty, unemployment, and health care, are being tackled by social entrepreneurs who usually employ innovative business models that simultaneously pursue social missions and the bottom line (Dees, 1998; Mair & Marti, 2006). Social entrepreneurship (SE) is a new approach that has proposed a large number of innovative solutions to address social problems by linking business to the society in need (Martin & Osberg, 2007; Porter & Kramer, 2011; Zahra et al., 2009).

After noticing the number of children in Argentina's villages without shoes during a 2006 visit, Blake Mycoskie invested $300,000 of his own money in a startup called TOMS Shoes (Delventhal, 2019; Sebastian, 2012). TOMS Shoes pledged to donate one pair of shoes for every one sold. Today, it has expanded its mission to support water, sight, birth, and anti-bullying initiatives (Delventhal, 2019). In addition, through TOMS, Mycoskie has raised awareness on issues like global

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poverty and health. So far, TOMS has provided about 70 million pairs of shoes, 335,000 weeks of safe water, and has helped to restore sight in more than 770,000 individuals by giving recipients prescriptive glasses or surgery in developing countries (Delventhal, 2019; TOMS, 2019).

Thousands of miles away, Muhammad Yunus, known as the “father of microfinance,” introduced the concepts of microfinance and microcredit in his native Bangladesh by starting the Grameen Bank in 1983 with a mission to empower villagers with the funding to pull themselves out of poverty (Yunus, 2011). According to Delventhal (2019), “97% of its 8.29 million borrowers are women, who pay their loans back at a rate of 97%. This is a recovery rate higher than any traditional banking system” (“6. Muhammad Yunus,” para. 1).

The positive role of SE in society raises the need for research on SE education. Although comparatively extensive research has investigated social entrepreneurs and their impacts on improving society as a whole, there is a paucity of research on how to educate students who might be future social entrepreneurs (Pache & Chowdhury, 2012). In particular, very little research has covered the impact of experiential learning on students through activities with a social mission. The growing interest in SE education through service-learning activities calls for research that observes the effect of students’ social service experiences on their learning about social entrepreneurs. Although researchers have proposed to adopt experiential learning in SE education, little is known about the relationship between social service-learning activities and improving students’ understanding of SE.

While SE has been on the rise in recent decades, SE itself means different things to different people, as the term contains two seemingly unrelated concepts—social and entrepreneurship. To many, *social entrepreneurship* means carrying out innovative activities with a social mission in either the for-profit or nonprofit sectors (e.g., Austin et al., 2006; Dees, 1998; Dees & Anderson, 2003; Emerson & Twersky, 1996). Others use it synonymously with not-for-profit organizations or to describe someone who starts a not-for-profit (Dees, 1998). In its broadest interpretation, SE could also refer to business owners who integrate social responsibility into their business strategy (Dees, 1998) or even to encourage established corporations to take on greater social responsibility (Seelos & Mair, 2005). According to Delventhal (2019):

> Nonprofits and businesses now team up to form a hybrid business model, led by a new generation of social entrepreneurs. These leaders successfully tackle social issues while generating profit for shareholders. Widespread usage of ethical practices such as impact investing, conscious consumerism, and corporate social responsibility programs facilitated the success of the following 10 social entrepreneurs. (paras. 1–2)

Therefore, the purpose of this article is to further clarify the term *social entrepreneurship* and shed light on what it takes to become a social entrepreneur. As such, this article has two major objectives: (a) review the available literature on definitions of SE, as well as the role of higher education in fostering SE through service learning; and (b) provide a synopsis of a series of socially embedded projects carried out by college students in Southern California in the 2016–2018 academic years to determine what the students' learning outcomes were and how these compared to findings in the literature.

Theoretical Foundation

While SE has extended the boundary of entrepreneurship, it has also created some theoretical and practical challenges. These challenges are hard to resolve using the traditional assumptions of economics, psychology, and management studies (Dacin et al., 2010). For example, the introduction of the prosocial emotions into the area of entrepreneurship was spurred by the need to understand social entrepreneurs' motivations that support their decisions to improve social goods at the expense of pecuniary and nonpecuniary rewards (Arend, 2013; Grimes et al., 2013; Miller et al., 2012).

SE is defined in diverse ways in the literature. Some define *social entrepreneurship* narrowly as economically viable ventures that improve social value (Emerson & Twersky, 1996; Robinson, 2006). Others define it broadly as ventures that conduct corporate social responsibility (Baron, 2005; Young, 2001). Within the narrow definition, SE might have a distinctive boundary as a theory in the form of its mission, motivations, strategies, objectives, and outcomes (Austin et al., 2006; Hockerts, 2006).

In contrast, within the broad definition, SE might be a second view on commercial entrepreneurship that contributes to improving social goods through its commercial operations (Mair, 2006). A broad definition of SE is well-described by Mair and Marti (2006):

> First, we view social entrepreneurship as a process of creating value by combining resources in new ways. Second, these resource combinations are intended primarily to explore and exploit opportunities to create social value by stimulating social change or meeting social needs. And third, when viewed as a process, social entrepreneurship involves the offering of services and products but can also refer to the creation of new organizations. (37)

Within the broad definition, however, the distinction of SE as a new domain of study has been challenged. For example, there is a view of entrepreneurship itself as a social activity because the created enterprises provide jobs, pay taxes, and innovate the standards of life (Mair, 2006; Mair et al., 2006). The issue in deciding the boundary of SE is similar to the debate on the definition of corporate social responsibility (CSR). The traditional view on CSR emphasized the economic role of enterprises (Friedman, 1970). Carroll (1991), however, suggested that three distinctive but related responsibilities—economic, legal, and ethical responsibilities—are essential components of CSR and, therefore, economic responsibility should be considered as one component of the social performance of a business. A more recent definition of CSR declares the importance of the triple bottom line of economic, legal, and ethical responsibilities (Aguinis, 2011). In sum, the boundary of CSR has been not only distinguished from but integrated with related conceptual frames. Thus, the promise of SE as a new field of research and practice may arise not only from the distinction but the integration of SE with related domains.

To facilitate the understanding of the boundary of SE, Short et al.'s (2009) study proposed the boundary conditions of SE with three independent and overlapping domains: entrepreneurship, public and nonprofit management, and social issues in management. As a result, the boundary of SE excluded the non-overlapping areas of the three domains and the overlapping area of public and nonprofit management and social issues in management, which represents the sole creation of economic value or loss of value creation (Short et al., 2009).

Defining SE is a complicated task that requires the balancing of disparate views of the value of SE. In general, however, scholars agree that there should be fruitful opportunities in SE as a unique area of study (Dacin et al., 2010).

Characteristics of Social Entrepreneurs

Social entrepreneurs represent a new type of leadership, which tackles social issues that are beyond the scope of established social entities such as governments or businesses in general. Thus, social entrepreneurs are a unique niche of entrepreneurs (Dees, 1998) who innovate their business models to resolve social issues in order to generate their bottom line.

Social entrepreneurs are active doers rather than passive no harmers (Fisscher et al., 2005). To be more concrete, what distinguishes social entrepreneurs from commercial entrepreneurs are their motivations, intentions, and the relative importance of their social missions over economic goals (Dacin et al., 2010). Based on these criteria, the motivations of social entrepreneurs play a critical role in activating entrepreneurial intentions and exploring and exploiting opportunities (Carsrud & Brännback, 2011).

Zahra et al. (2009) propose three types of social entrepreneurs according to their motivations: social bricoleurs, social constructionists, and social engineers. *Social bricoleurs* are social entrepreneurs with noble motives, such as identifying local issues and initiating innovative solutions. *Social constructionists* are social entrepreneurs with complex motives due to the subjective nature of their solutions aimed at changing society. Finally, *social engineers* are social entrepreneurs who are motivated to introduce revolutionary changes in society.

It is notable that both social and commercial entrepreneurs have intentions for social and commercial value creation. On the continuum of social-economic value, the intention of social entrepreneurs is closer to the creation of social value than the creation of economic value compared to that of commercial entrepreneurs (Bacq et al., 2016). Thus, social entrepreneurs might be characterized by their inclination to strive for achieving more of a social mission than the economic bottom line compared to commercial entrepreneurs. In sum, while social and commercial entrepreneurs share some characteristics, social entrepreneurs have distinct characteristics of society-oriented motivation and intention, which has significant implications for SE education.

Characteristics of Social Entrepreneurship Education

There are several characteristics of SE that should be considered in initiating SE programs in higher education. First, SE education should be conducted in the context of entrepreneurship education because it cannot be completely separated from entrepreneurship (Tracey & Phillips, 2007). As mentioned, SE has a distinctive nature compared to general entrepreneurship in terms of its audacious pursuit of both social and economic goals through innovative business models. However, the fact that SE is distinctive does not necessarily mean that it composes a new domain of study. Rather, SE is within a continuum of diverse types of entrepreneurship. Thus, social entrepreneurs have to acquire knowledge and skills related to social enterprises in addition to knowledge and skills related to general entrepreneurship.

Second, since social enterprises pursue the integration of a social mission with economic goals, this complex dynamic should also be reflected in the goals and learning outcomes of any approach to SE education. In general, the creation of social value can be achieved at the expense of economic goals and vice versa. Smith et al. (2012) argue that there are paradoxical tensions between social and commercial goals, which should be addressed in SE education. Based on the paradox theory, Smith and Lewis (2011) propose three skills that would help social entrepreneurs embrace the SE paradox: acceptance, differentiation, and integration. *Acceptance* involves social entrepreneurs understanding these paradoxical tensions of social entrepreneurship; *differentiation* enables social entrepreneurs to exploit each component of social entrepreneurship; and *integration* means social entrepreneurs endeavor to find ways to create synergies between social and economic goals. As such, social entrepreneurs are to be educated to deal with the paradoxical nature of SE.

Third, the curriculum for SE education should be based on the social theories of learning. The traditional cognitive theory posits that teachers are to deposit knowledge in the students so that students can withdraw the stored knowledge when they need to use it (Fox, 1997). In contrast, social theories of learning ask teachers to provide social environments in which students learn by participating and engaging in social practices (Gherardi et al., 1998). As experiential learning is a critical part of entrepreneurship education (Tracey & Phillips, 2007), it is critical to SE education as well.

The Foundational Role of Service Learning

As some college students have the desire to make a difference and change the world, SE education programs became a focal point in university curricula worldwide (Brock, 2008; Miller et al., 2012). SE education as preparation to help the community, therefore, is vital to the development of student leadership skills.

According to Boyer (1994), institutions of higher education must reconsider their mission from a career orientation to one that helps students become responsible citizens. In this way, higher education connects theory to practice and helps mitigate existing social problems (Boyer, 1994). Boyer also argues that institutions of higher education must play a pivotal role in developing scholarship connected to and integrated with community service. In this way, the scholarship asserts the ethical base for learning while connecting students to the world beyond their familiar campus (Boyer, 1994; Coye, 1997). It also links citizenship to service to the community (Barber, 1994; Boyte, 1993) and provides substantial impact for students (Bringle & Hatcher, 2000). The integration of service learning into higher education is a way to improve the relevance of education while addressing societal needs (Zlotkowski, 1996).

Navarro (2008) notes that students need multidisciplinary integration, experiential education, ethics and social responsibility “citizenship” practice, soft skill building, and global exposure, among other things. Similarly, the theory of “New Education” or “democratic education” as proposed by Dewey (1916, 1927) stresses that students must be able to shape their own learning through help from the curriculum and reflecting on its value. Advances in democratic learning will come when students, among others, are engaged in real-world problem solving that requires intelligent judgment and taking of action. Similarly, Boyer (1994) stresses that

> the academy must become a more vigorous partner in the search for answers to our most pressing social, civic, economic, and moral problems, and must reaffirm its historic commitment to what I call the scholarship of engagement. (11)

Rutti et al. (2016) suggest that business schools across the country adopt the service-learning pedagogy at an early stage, as it provides a chance for everyone to win—a win-win situation. While community-engaged students provide numerous benefits to society at little or no cost, it also provides a provocative real-world experience for the students by turning them into the providers of the service themselves (Rutti et al., 2016). Andrews (2007) concludes that the fields of information systems, management, and marketing report more service-learning projects than finance and accounting, as service learning is better suited in business courses where interaction with users is a key learning goal. Eyler et al. (2001) suggest that one of the positive effects of service learning on college students is the development of a sense of meaning and purpose in their academics; the students experience a transformation as they start looking at things in different ways.

It is important to note here that service learning is not simply another form of volunteerism. According to Wilson (2000), *volunteerism* is any activity dedicated to benefiting another person, group, or cause, usually without expectation of recompense, and is generally altruistic in nature. Accordingly, the main beneficiaries are generally those served by the student. Community service is quite similar to volunteerism. However, community service is more structured and requires a greater commitment on the part of participants than does volunteerism (Wilson, 2000). The Corporation for National and Community Service (n.d.) stresses that volunteering has positive benefits for the volunteer as well as for the person or community served, including pride, satisfaction, and accomplishment.

It might, therefore, be argued that service-learning activities can bridge the gap between the theoretical foundations of business education and the real world by developing in students a well-rounded worldview coupled with a sense of social responsibility. This bridging, in turn, might result in a paradigm shift in how students prioritize future economic value versus social value creation—with the latter being valued more highly. In other words, service-learning activities may play a role in creating the necessary mindset for future social entrepreneurs.

Motivators Underlying the SE Mindset

Miller et al. (2012) found that current research into entrepreneurial motivators argues the nonpecuniary nature of the rewards sought by social entrepreneurs—e.g., a sense of achievement or a need for autonomy. While nonpecuniary in nature, these motivators are still self-interested. However, Miller et al. (2012) point out that a focus on self-interest-related motivators ignores the complexity of the factors underlying why social entrepreneurs behave the way they do. As Yitshaki and Kropp (2016) note, social entrepreneurs rely on cognitive, behavioral, and emotional strategies to keep their ventures focused around a central social mission. Therefore, a simplistic focus on the nonpecuniary nature of the rewards sought by social entrepreneurs ignores emotions that might motivate an individual to take actions in favor of communal well-being rather than self-interest (Bowls & Gintis, 2002). In other words, while SE might be partly based on self-interest, it cannot be the sole motivator for why social entrepreneurs start their businesses. As such, it is important to understand why social entrepreneurs are willing to incur personal costs—i.e., understanding what emotions underlie their decision making and how they are motivated (Miller et al., 2012; Grimes et al., 2013).

Yitshaki and Kropp (2016) categorize prosocial motivators as push and pull factors, where push factors may be either personal or external factors (e.g., lack of skills, aged out of the market), while pull factors are motivations, internal to the individual, that draw them to become prosocial. In their exploratory study of what motivated 30 Israeli social entrepreneurs to form social ventures, Yitshaki and Kropp found that social entrepreneurs derive meaning from their push and pull factors before recognizing an opportunity to form a prosocial venture. Yitshaki and Kropp and Shane (2000) found that social entrepreneurs evolved their social awareness via their push motivations because of various triggers (e.g., searching for meaningful activities), while they developed opportunity awareness via a combination of social awareness and personal life experiences.

One poorly understood motivator of SE is the role of compassion in motivating the actions and decision making of social entrepreneurs (Miller et al., 2012). Brink (2015) compared the impact of passion (self-interest) with the impact of compassion (prosocial interest) in a network of 55 Danish food-producing SMEs. Brink (2015) concludes that while neither passion nor compassion *directly* influenced growth, compassion had a significantly positive influence on a manager’s ideas, which then spilled over into positively influencing company growth. In fact, Brink found that managers who could leverage the duality of self-interest and prosocial motivators had the highest growth yields. Grimes et al. (2013) argue that compassion has more staying power as a prosocial motivator than other factors, and when activated in an institutional context that points toward SE, it can result in the creation of prosocial ventures.

While preconditions for SE include increased integrative thinking, conducting cost–benefit analyses from a prosocial point of view, and developing a commitment to help others, each of these preconditions by themselves will not create SE. However, within an institutional setting that underscores the legitimacy of SE, they can become channels for SE (Miller et al., 2012). Therefore, in the next section, we showcase student participation in a series of prosocial activities and examine their impressions of these experiences in creating a mindset that might lead them toward SE in the future.

Service Learning Through Enactus Projects: A General Overview

This section presents a few examples of social entrepreneurship projects carried out by students of a university in Southern California during the 2016–2018 academic years. In 14 years, the Enactus team at this university has carried out more than 40 projects. Enactus is an acronym for Entrepreneurial-Action-Us and is the world’s largest experiential-learning platform with teams at 1,730 campuses in 36 countries. The network of business, academic, and student leaders “are unified by our vision—to create a better, more sustainable world.” (Enactus, n.d., para 1). Guided by an academic advisor and business experts, the student leaders of Enactus create and implement community empowerment projects around the globe. The experience is aimed at transforming lives and helping students develop the kind of knowledge and skills that are essential to any form of leadership in an ever-more complicated and challenging world. What follows are synopses of five projects aimed at helping communities/individuals in need in the Philippines, California, and Mexico and their relationships to the goals of SE education mentioned above.

Project 1: Clothing for Dignity and Success (Philippines)

The purpose of this project was to provide students with an understanding of how poverty creates a self-sustaining cycle of more poverty, leading to a lack of upward social mobility. The project focused its efforts on the Philippines where, despite decades of governmental efforts to reduce poverty, 25% of Filipinos live on less than $5,000 per year (Jennings, 2015) due to existing inequities in the overall distribution of the country's resources as well as a burgeoning population.

According to USAID (2014), most of the Filipino poor live in rural areas and work in the agriculture sector, such as farming and fishing. Nevertheless, urban poverty has increased dramatically as the rural poor have migrated to cities in search of low-paying jobs. This influx of rural population has led to cities being overwhelmed with lack of available housing, homelessness, crumbling infrastructure, and a private sector unwilling to create more/quality jobs (USAID, 2014; World Bank, 2014). One consequence of all this is that 1.5 million children live on the streets and have little to no education or any chance of ever escaping poverty (de Jesus, 2009). In addition, while low-income families whose children had attained higher levels of education and were in a better position to access remunerative jobs, either in the Philippines or abroad (Reyes, 2002), one in five college graduates remained unemployed (Ramirez-Cohn, 2014).

Taking Action. With their newfound understanding of the interplay between economics, social mobility, and population increases and their consequences, Enactus students decided to focus their efforts on collecting and donating business attire for out-of-work, recent Filipino college graduates. The students felt that with the proper attire, these graduates will have higher self-esteem and self-respect and would, therefore, be better prepared for going to interviews and making the most of opportunities that come their way.

Accordingly, and through a partnership with the Rotary Club of Lingayen, Pangasinan Province in the Philippines, and Pangasinan State University (PSU), the donated business clothing went to recent college graduates. PSU offers TESDA (Technical Education and Skills Development Authority), a vocational program in which students are taught specific skills for a period of six months to two years. These students receive clothes not as charity but as motivation to move forward. Some of the students enrolled in the program are those who are out of school and trying to improve their chances of entering the labor market. This group might include high school graduates, secondary school dropouts, college undergraduates, and college graduates who lack or need specific competencies in different occupational fields. Another group enrolled at TESDA includes those who are currently unemployed, actively looking for work, and want to improve their chances of getting a job. This group includes laid-off workers/employees for reasons including the closure of establishments, retrenchments, or layoffs due to economic or other related reasons. A third group is returning off-shore workers (OFWs) who want to stay in the Philippines and be a part of the government re-integration program. Finally, those who are currently employed but need to upgrade their skills or acquire new skills are also included (Orbeta & Abrigo, 2012).

Enactus collected and shipped more than 5,000 pounds of donations, including more than 4,000 clothing items for men (pants, jackets, and shirts), 5,000 clothing items for women (blouses, dresses, skirts, and shoes), and 700 books (academic and others), along with 300 twelve-page *Success Skills Manuals for Recent Graduates,* which contain information and instructions on résumé writing and an interviewing guide. The success skills manual was prepared by Enactus members. In the 2016–2017 academic year, of the 500 Filipino students who benefited from the distribution, about 240 students got a job, 36 started a small trade business (e.g., electrician, mechanic, plumber). While the Enactus team does not claim credit for all of that, they believe that their contribution was helpful.

Project 2: Recycling Fishing Nets (Philippines)

The purpose of this project was to help fishing communities in the Philippines recycle old or unused fishing lines into new tools as a way of developing a new trade while taking personal responsibility toward ecological sustainability.

Howard (2019) indicates that solid waste (e.g., plastic bags, foam, discarded fishing nets) is frequently consumed, with often fatal effects, by marine mammals, fish, and birds that mistake it for food. Similarly, Casey (2014) estimates that solid waste in oceans is as high as 5 trillion pieces, with about 10% of this coming from fishing gear of various kinds. Finally, Shea (2014) asserts that abandoned fishing nets and pots trap, maim, and kill hundreds of marine animals daily.

Taking Action. Enactus students first collected unused and wasted fishing lines polluting the ocean around the Orange County Coast, and then worked to redistribute them to the students of the College of Fisheries in the city of Lingayen, in the Pangasinan Province of the Philippines, so that they could be repurposed into usable fishing nets for local fishermen.

Results. Enactus students made 25 fishing nets from these recycled fishing lines and provided a step-by-step video to the students of the College of Fisheries on how to make these nets. They then shipped the sample nets, along with a jumbo box of with enough recycled fishing lines to make more than 100 fishing nets. Fishing nets and recycled fishing lines were provided to a total of 45 College of Fisheries students.

Project 3: The School Garden Challenge (Claremont, California)

The purpose of this project was to educate middle schoolers in a Claremont, California, school about what constitutes a healthy lifestyle as a way of combating rising rates of childhood obesity.

In the last 30 years, the percentage of American children who are overweight or obese has tripled. According to the National Conference of State Legislatures (NCSL, 2014), obesity is "a common and costly health issue that increases the risk for heart disease, type 2 diabetes, and cancer, affects more than one-third of adults and 17 percent of youth in the United States" (para. 1). In fact, one in three children born in the year 2000 are on track to develop Type II diabetes (one in two if they are a child of color); 23% of all American children face food insecurity; and only 2% of children eat enough fresh fruits and vegetables. According to the NCSL, no state has an obesity rate below 21%, and the obesity figures in the United States are epidemic, with 78 million adults and 12 million children classified as obese. The Centers for Disease Control and Prevention (CDC, 2016) argue that excessive weight gain in childhood correlates to unhealthy eating, exercise, and sleep habits. It can also cause psychological and quality of life issues such as anxiety or depression (CDC, 2016; Halfon et al., 2013; Morrison et al., 2015). As a consequence, children develop health risks commonly seen in older adults, including cardiovascular disease, diabetes, and joint and musculoskeletal disorder (CDC, 2016; Cote et al., 2013; Lloyd et al., 2012; Narang & Mathew, 2012).

While consuming a healthy diet and being physically active can help children grow as well as maintain a healthy weight throughout childhood, poverty was found to be positively correlated with this phenomena (Darmon & Drewnowski, 2008; Drewnowski et al., 2004; Greenough et al., 1998; Siple, 2012), as diet quality is related to income levels (Darmon & Drewnowski, 2008) due to cost differences between high- and low-quality foods.

Finally, according to Siple (2012), the lack of physical activity is another commonly cited problem fueling the obesity epidemic in the United States, as low-income families live in neighborhoods where it is dangerous to play outside, which limits the amount of exercise their children can get.

Taking Action. The Enactus team decided to take on the challenge of educating more than 580 K–7 students at a local middle school in Claremont and 450 K–6 students in Pomona, California, about the benefits of healthy eating and physical activity.

Results. Team Enactus created a 13-bed vegetable garden (about 12 feet by 6 feet each), including 3 raised beds for students with physical challenges at each school. In the beds, students planted a variety of seasonal vegetables to help the children grow for use as part of a healthy eating plan. They also provided health education and a series of physical activities to teach the students about living a healthier lifestyle. Results from a post-program survey indicated that all participants (100%) were committed to healthy eating and exercise.

Project 4: Social Entrepreneurship (Mexico)

The purpose of this project was to equip a single mother in Mexico with the resources, skills, and knowledge to set up her own business.

Badgers (2014) suggests that family structure and poverty are intertwined. For example, while just 6% of families led by married couples are poor, nearly a third of households headed by single women live below the poverty line. Similarly, *Single Mother Guide* (2019) states that single mothers are nearly five times as likely to be poor as compared to attached mothers, as the number of single mothers is on the rise and the amount of help available to single mothers has remained the same. According to Mallén (2013), Mexico's poverty rate for 2012 was 45.5%. With an overall population of 117.3 million in 2012, the number of Mexicans living in poverty was around 53.3 million (Mallen, 2013). In addition, incomes are not keeping abreast of price increases, making life much harder for single mothers—and women in general—in Mexico.

Taking Action. Enactus visited Mexico to help a widowed, single Mexican parent with three dependents (two adults and a granddaughter) establish a small catering business that primarily sold to construction workers across the freeway from where she lives. She had no business experience and no money to purchase the tools and resources needed to start the business.

Results. Enactus members provided the woman with the necessary tools and resources for getting the business started. They provided guidance in setting up the business and were on site the day of business launch, which proved to be successful. Follow-up conversations with the woman indicated that her economic situation was drastically improved and that she felt more optimistic regarding her future. The team is continuing to monitor the progress of the business and the woman's well-being.

Project 5: Realizing a Dream: Empowering a Poor Family (Mexico)

As previously mentioned, Mexico's poverty rate is high, and wages are not keeping abreast of the cost of living increases (Mallén, 2013).

Taking Action. The Enactus team crossed the border to Mexico in February 2018 to help a Mexican street vendor named Salvador, who has nine children and is trying to improve his family life. For years, he had pushed a stroller around with tamales, burritos, and fish, if he was able to catch any to sell. Each day, his wife would cook food, and he would take it to the city center to sell in order to earn each day's living. His dream was to have a bicycle cart in order to expand his business to the city as well as by his home. A bicycle would enable him to reach further distances and save time, allowing him to earn more money. His wife and children would also be able to make sales by setting up tables and chairs outside of their homes to sell food and beverages. Salvador is from one of the barrios near the town of Puerto Nuevo. He lives on a tight budget and has no money to send his eldest children to school, let alone buy new equipment and tools to expand his business.

Results. The Enactus team helped Salvador and his family by getting him a bicycle cart, new coolers, equipment to cook food, meats for a week, tables and chairs, as well as a supply of food with a long shelf life including flour for his tamales, tomato sauce, bottled drinks, starch, and vegetable oil. Enactus affected the lives of this family by supporting Salvador's entrepreneurial action. With that help, he was able to travel 21 kilometers to Rosarito, a major tourist city nearby, and increase his sales by nearly 200% because of the time and energy he saved. Before, he was only able to travel to Puerto Nuevo and walked nearly 6 kilometers to work each day. He would stay until he had sold his entire product and come home each day exhausted, barely managing to earn a living. With his new bike and advanced supplies, he was able to make and sell more food and possibly provide a better lifestyle for his nine children, grandchild, and wife.

Method

According to Eyler (2009), feedback and reflection constitute the most critical factor for achieving powerful learning outcomes from experiential learning.

> Challenging, continuous, context-appropriate reflection turns work experience into learning experience. It is easy to underestimate how intensive reflection must be in order for it to have an impact; it is not unusual to find faculty members who believe their program provides adequate reflection even though the effects on students fall short. (Eyler, 2009, 30)

In keeping with using reflection as a means of achieving learning outcomes, each of the 45 participants was asked to submit a written reflection that included their takeaway from their experience and what had inspired them. Participants were informed that they could withdraw from the reflection writing activity at any time without this affecting their continued participation in other aspects of the study. Completed reflections were returned to the Enactus advisor in person. However, to ensure the validity and confidentiality of the collected information, the reflection did not require a participant's name.

To determine whether participation in Enactus activities had caused the participants to become more civic-minded, a preliminary reading of the participants' reflections was performed. The reading indicated that there were patterns in the responses. Drawing on themes found in the literature, the responses were coded into primary and secondary themes that indicated how students had been impacted by their Enactus activities.

To determine whether the experiential learning approach through social actions might motivate Enactus students to increase their interest in engaging in SE in the future, we used a computer-aided content analysis software, DICTION (Digitext, 2019), to analyze the vocabulary used in the students' descriptions and reactions to the activities. DICTION (Digitext, 2019) was chosen because it has been extensively used in social science research to study everything from political messages to medical documents and, more recently, internet traffic (Hart & Carroll, 2008; Short & Palmer, 2008). Taking into consideration the characteristics of SE, we selected five variables related to two different levels of SE value from the pre-built dictionaries in the DICTION software package.

The first set of variables relates to SE value at the society level. According to Ruebottom (2013), SE needs to entail the shared value of resolving social issues. In addition, SE needs to build legitimacy and credibility, which assists social entrepreneurs in collecting resources. In other words, the collective support of a social mission is an essential component of SE (Defourny & Nyssens, 2010). Thus, to represent the society level of SE, we selected the variables *collectives, cooperation,* and *diversity.*

The second set of variables relates to SE value at the individual level. According to Ahmad (2018), individuals who are likely to praise others and disseminate the positivity rooted in self-satisfaction, compared to individuals who expect to take them from others, are characterized as other-oriented. Other-orientation is an important motivational factor that encourages individuals to engage more in SE than commercial entrepreneurship (Miller et al., 2012). Thus, to represent the individual level of SE, we selected the variables *praise* and *satisfaction.* (See Appendix A for the meaning of the selected DICTION variables.)

Results

Based on the primary and secondary themes that emerged from the initial review of the reflections, as can be seen in Table 1 on the next page, Enactus activities did seem to engender a growing sense of social responsibility (e.g., deepening passion for helping the needy through entrepreneurial actions) as well as personal growth in the direction of increased compassion for people in need (e.g., being grateful for what I have). In addition, there was evidence that some of the Enactus participants may have experienced a shift in their valuation of prosocial activities (e.g., how not everyone acts in pure self-interest). Finally, Enactus participation seemed to have an impact on the pull factors (e.g., becoming proactive in changing the world) for some of the participants.

Table 1: Student Outcomes from Participation in Enactus Projects

Primary Themes	Secondary Themes
Experiencing personal growth	Being grateful for what I have
	Feeling good inside by helping others
	Developing ongoing humility
Developing social responsibility	Deepening passion for helping the needy through entrepreneurial actions
	Becoming proactive in changing the world
	Persuading others to participate in outreach activities
	Growing drive/desire for future outreach activities
Weighing social versus economic value	How collaboration can make a difference
	How not everyone acts in pure self-interest
	How little it takes to help the needy
Giving back to the community	Learning to pass the knowledge to someone and hoping they can do the same
Becoming a future leader	Learning how to lead in a global context

Table 2 shows the mean scores of Enactus students across the five variables compared to the mean scores derived from DICTION's normative data bank (a repository of all other texts analyzed using the software representing nonparticipants in the Enactus program). Among the five variables, the cooperation value at the society level and the praise and satisfaction variables at the individual level showed the greatest difference between the two populations. To a lesser extent, Enactus students also scored higher on the variables of collectives and diversity. When depicted graphically (Figure 1), the distinction between the general population (inner shape) and Enactus students (outer shape) is even more noticeable, with Enactus students scoring higher across all variables.

Table 2: Enactus Participants' Scores Compared to Nonparticipants' Scores

DICTION Variables	Enactus Students' Mean Scores	Data Bank Mean Scores
Collectives	10.01	9.25
Cooperation	11.26	4.40
Diversity	2.49	1.94
Praise	10.69	6.18
Satisfaction	8.78	3.28

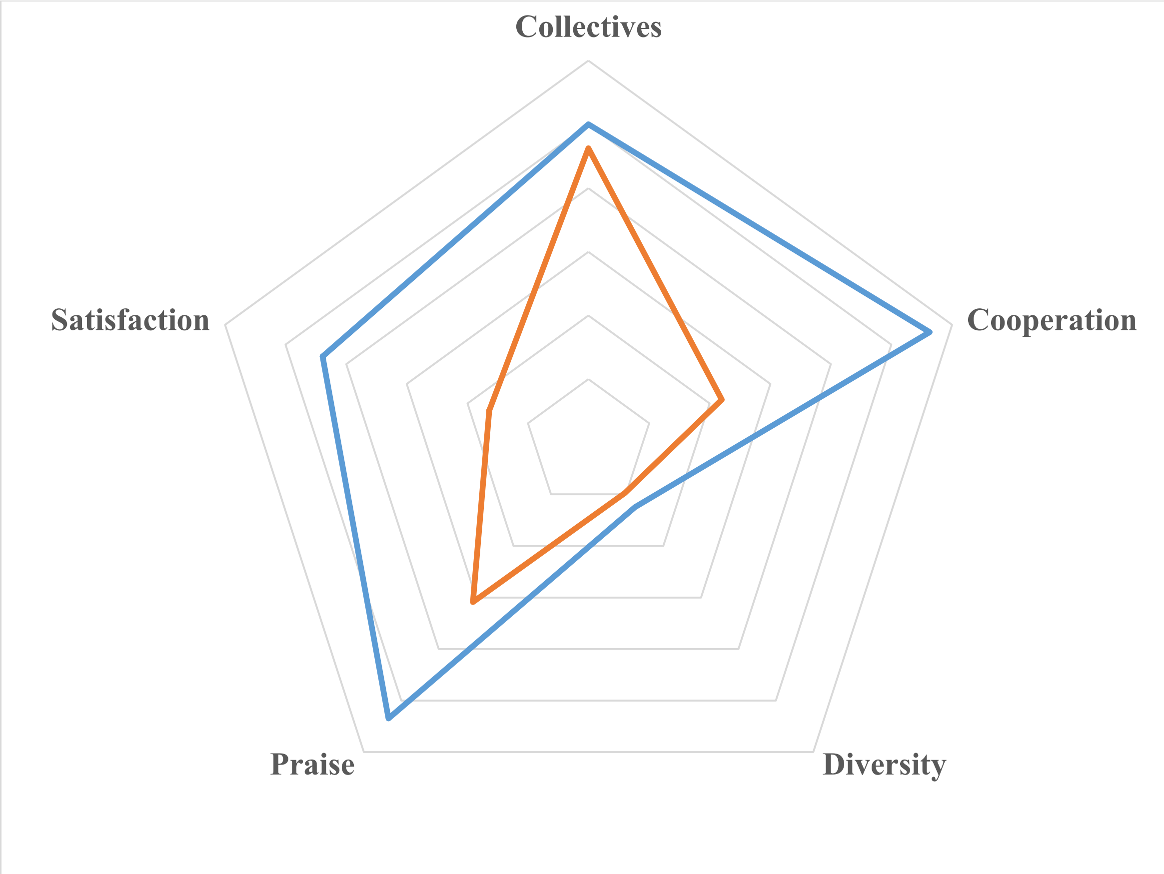

Figure 1. Enactus participants' scores compared to nonparticipants' scores

Taken together, the results indicate that the Enactus program did indeed teach SE through experiential learning. Overall, the language in the reflections indicated that Enactus participants, when compared to nonparticipants, had higher engagement with group work and cooperative interactions and were more tolerant of individual or group differences. Also, they were more likely to be a positive influencer with their affirmative and other-oriented propensity.

Conclusion

Implications and Outcomes

Boyer (1994) calls for institutions of higher education to reinvent their missions away from a focus on career orientation to helping students become responsible citizens by connecting theory to practice in the context of alleviating social problems—i.e., adopting a service-learning pedagogical approach. Boyer and Coye (1997) argue that this approach would allow the scholarship to act as an ethical foundation for linking citizenship and community service in the context of a wider world (Barber, 1994; Boyte, 1993; Bringle & Hatcher, 2016). In turn, this revised educational mission would substantially impact students by imparting them with a multidisciplinary integration of experience, social responsibility, and global exposure, while engaging them in real-world problem solving—a win-win scenario for all (Dewey, 1916, 1927; Navarro, 2008; Rutti et al., 2016). Therefore, service-learning pedagogy can function as a conduit for SE by helping to further hone the pull factors (i.e., internally derived pull toward social actions that help to create a better world) underlying the motivations of social entrepreneurs (Miller et al., 2012; Yitshaki & Kropp, 2016).

The five Enactus projects featured in this article adopted a service-learning pedagogical approach by first introducing students to economic conditions, and related socioeconomic issues, in a global context. Next, each project required students to brainstorm an approach to alleviating what they considered a key issue. Finally, students were asked to use a problem-solving approach to planning and executing a solution to the targeted issue. In closing, Enactus activities did meet the definition of a service-learning pedagogical approach, with encouraging outcomes in creating some aspects of the SE mindset (experiencing personal growth, developing social responsibility, weighing social versus economic value). However, Enactus projects also met the third requirement of SE education in that, unlike traditional cognitive theory practices, in which teachers convey information, learning, and new knowledge to the students (Fox, 1997); they provided a social environment in which students participated in experiential learning (Gherardi et al., 1998). (See Appendix B for student reflection samples.)

Limitations and Directions for Future Research

This study has limitations that may encourage future research. First, this study employed a relatively small yet convenient sample of 45 Enactus students who participated in five projects through one university. That by itself constitutes a major deficiency, as the sample is small and limited to one university. While Enactus is a worldwide organization with global outreach, the study suggests more collaboration among other universities to measure the impact of such a program on students' learning and development. Accordingly, future research should collect the necessary data to generalize the results of this study by comparing the value of different programs.

Second, the majority of our participating members were domestic students who got involved in domestic and global projects. To this end, future research should be conducted with students from other countries and other cultures and employ a larger sample.

Third, this study so far is limited to one group and thus far has no follow-up outcomes of their future engagement in their community. Accordingly, this study suggests that programs preparing college students to be social entrepreneurs deserve more empirical research and analysis. While the current study could be a source of major empirical research designed to further test the impact of said programs, this study specifically suggests that future research focus on this group after they leave college to test whether their passion to others and their community is still alive or it died at the college gate.

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Issam Ghazzawi, PhD, is a professor of management and Sam Walton Fellow at the University of La Verne, California. He received his PhD from the University of Pittsburgh, a Master of Labor and Human Resources (M.L.H.R.) from The Ohio State University, and a Master of Business Administration (MBA) from Sul Ross State University. His areas of research include job satisfaction, leadership, organizational effectiveness, and organizational commitment. He has published articles and business cases in various American and foreign academic journals. He was inducted into the ULV Academy in 2017 and is the recipient of the Drs. Joy and Jack McElwee Excellence in Research Award, the Ahmad Ispahani Excellence in Teaching Award, the Young Scholars Award, the Ellsworth Johnson Faculty Service Award, and the University of La Verne Excellence in Teaching Award. Dr. Ghazzawi received numerous other awards and recognitions in 2018, including a U.S. House of Representatives Certificate of Special Congressional Recognition for Excellence in Environmental Leadership, a California State Assembly Excellence in Community Leadership Award, the Inland Valley News Excellence in Community Leadership Award, the Jack Kahl Entrepreneurial Leadership Award, the Pomona Board of Education Service Award, and a City of Pomona Certificate of Recognition. He is past president of the Western Casewriters Association. He can be reached at ighazzawi@laverne.edu.

Byungku Lee, PhD, is an assistant professor of management at the College of Business and Public Management, University of La Verne, California. He earned his PhD and MA from the University of Nebraska–Lincoln. Dr. Lee's research interests are corporate social responsibility, social entrepreneurship, and general entrepreneurship. He can be reached at blee2@laverne.edu.

Christine Jagannathan, EdD, is a professor of practice–business communication at the College of Business and Public Management, University of La Verne, California. She earned her EdD in Organizational Leadership from the University of La Verne and an MA in English from California State Polytechnic University–Pomona. Dr. Jagannathan's research interests are the teaching and acquisition of critical thinking skills, the influence of writing on thinking, and data mining. She can be reached at cjagannathan@laverne.edu.

Appendix A

Meanings of the Selected DICTION Variables

Collectives: Singular nouns connoting plurality that function to decrease specificity. These words reflect a dependence on categorical modes of thought. Included are social groupings (crowd, choir, team, humanity), task groups (army, congress, legislature, staff) and geographical entities (county, world, kingdom, republic).

Praise: Affirmations of some person, group, or abstract entity. Included are terms isolating important social qualities (dear, delightful, witty), physical qualities (mighty, handsome, beautiful), intellectual qualities (shrewd, bright, vigilant, reasonable), entrepreneurial qualities (successful, conscientious, renowned), and moral qualities (faithful, good, noble). All terms in this dictionary are adjectives.

Satisfaction: Terms associated with positive affective states (cheerful, passionate, happiness), with moments of undiminished joy (thanks, smile, welcome) and pleasurable diversion (excited, fun, lucky), or with moments of triumph (celebrating, pride, auspicious). Also included are words of nurturance: healing, encourage, secure, relieved.

Cooperation: Terms designating behavioral interactions among people that often result in a group product. Included are designations of formal work relations (unions, schoolmates, caucus) and informal associations (chum, partner, cronies) to more intimate interactions (sisterhood, friendship, comrade). Also included are neutral interactions (consolidate, mediate, alignment), job-related tasks (network, detente, exchange), personal involvement (teamwork, sharing, contribute), and self-denial (public-spirited, care-taking, self-sacrifice).

Diversity: Words describing individuals or groups of individuals differing from the norm. Such distinctiveness may be comparatively neutral (inconsistent, contrasting, nonconformist) but it can also be positive (exceptional, unique, individualistic) and negative (illegitimate, rabble-rouser, extremist). Functionally, heterogeneity may be an asset (far-flung, dispersed, diffuse) or a liability (factionalism, deviancy, quirky) as can its characterizations: rare vs. queer, variety vs. jumble, distinctive vs. disobedient.

Appendix B

Student Reflection Samples

It was a great opportunity to be able to give back to the local community. I live less than 10 minutes away from Pomona, and yet I never really knew the struggle or situation many of these students were in until I joined Enactus. It really was special to me when I was given the chance to be able to teach or help someone else the skills I was so blessed to have learned already. . . . Through the few weeks that we have worked with these students, I have seen their growth. . . . Being able to give someone the help I received when I was a high school student really made this experience come full circle. Now I just cannot wait until the day these kids are going take over the world!
—Elmeera, 2017

Being in Enactus has been the greatest experience of my college thus far. I cannot explain the feeling that I get after we complete a project each time, especially this past Wednesday when we distributed the clothes. . . . Seeing the faces on the kids after they picked out their clothes was so exciting. Every day we have a choice to make a difference in someone else's life, but being in Enactus just becomes a part of our daily lifestyle. So far, the two projects that have been completed are the Solar Water Project and the Clothing Drive. Both projects meant a lot to me and had the utmost impact on my life. I am very blessed to have been a part of such an act of kindness.
—Melanie, 2017

The idea of building packs that allow others to have drinkable water was a bit out of the box. However, after finding out that these packs are made from sustainable types of plastic and bubble wrap, it is amazing how easy it is to help others all around the world.

In the back room of the warehouse, our team was able to learn about how solar water packs became reality and be hands on to create these packs ourselves. Although there were slight errors when sealed incorrectly, our group made 100 packs that will bring clean drinking water to the people of Cambodia.

Personally, I feel good about myself as well as accomplished because I have always wanted to give back to the world but did not know where to start. Overall, this project has opened my eyes to many new ideas to be accomplished in the future.
—Ebony, 2018

It was an extraordinary idea in the first place to build solar water packs in order to cleanse unsafe fresh water. The fact that I had the opportunity to build some of the water packs to be given to someone across the globe who truly needs it, was a fulfilling experience that I was excited to be a part of. At first, it was difficult to [imagine] who we were actually going to help, but once I did some research on the water problem in Cambodia and saw the photograph of the students at the

Cambodian school that would be receiving these solar packs, it really made it obvious to me how much we were going to affect change in that community.

My experience making the packs specifically was very fun. First, I had to opportunity to learn the science behind the pack itself. We learned together as a group about the different bacteria and viruses that could infect water and how it happens. Additionally, we [had] to understand what exactly the solar pack uses to eliminate these harmful substances. Then I [had] to learn how this tied into business and entrepreneurship, which really made me interested. We got to learn what exactly it took for the owner of the business . . . to create the product and stay in business, while keeping with his philanthropic mission. Finally, we [had] to do the fun part of building the packs. I got the job of pressing all of the materials together in order to form the actual pack that would hold the liquid. It was very fun to operate machinery, especially keeping in mind that it was for a good cause.
—Robert, 2018

It has turned out to be a very interesting experience. I have had a lot of fun working with all the new people I have met and the kids we have helped. . . . It was an amazing experience being able to make a positive impact on the kids. Seeing how interested they were in getting any amount of help made helping even better. . . . It has been an amazing semester, learning how to help someone who needs it, and I feel like I have grown as a person because of it.
—Izabel, 2017

After I accidently got involved in a project, I was eager to learn more. I was hesitant to get involved because I thought the kids would think of it as a joke but to my surprise, they were more than willing to participate and be involved and were just eager to learn more. At this point, I felt a little excited to participate. I felt that I was doing something that actually mattered to someone. I was able to take the knowledge that I [had] learned and pass it down to someone new, and hopefully he or she can pass it down to someone they know, and so on and so forth. I think in the future I will be more inclined to help with projects or even volunteer to help with charities. It feels good to give back.
—Lorena, 2017

PRACTICE

Managing Organizational Culture: A Practice-Oriented Framework*

Charles D. Kerns
Pepperdine University
Corperformance, Inc.

How executives and their reports manage organizational culture impacts performance and well-being for stakeholders. After a brief review of some relevant literature, a practical operational definition for managing organizational culture and a practice-oriented framework are offered. This framework is intended to help practice-minded scholars, educators, and practitioners bridge the divide between theory and the real-world practice of leadership. Six essential action areas, which in practice are dynamically interrelated, are integrated into this framework. The application value and implications along with some challenges are presented. This article contributes to advancing the practice, applied research, and teaching relating to the key managerial leadership practice of managing organizational culture.

Key words: building blocks, effectiveness, managing, organizational culture, practice framework, well-being

Organizational culture can be considered as a system of *shared meaning* held by key stakeholders that sets an enterprise apart from other organizations (Schneider et al., 2013). It is a construct that receives wide coverage in both popular and academic publications (Schneider et al., 2017). The perceived importance of organizational culture as a source of value creation among U.S. corporate executives in over 1,000 organizations was recently reported by Graham et al. (2016). Connecting organizational culture with effectiveness and performance is reflected in both qualitative and quantitative research findings (Sackmann, 2011; Yauch & Steudel, 2003). The value of managing organizational culture can be seen in many areas. Well-being, for example, is an increasingly important behavioral outcome that affects employee functioning within an organizational culture (Jex et al., 2014; Kerns, 2018a; Rath & Harter, 2010).

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Organizational culture has been defined and conceptualized in many ways, leaving the practitioner without a clear and coherent framework or process to apply when seeking to manage this construct in workplace settings (Zohar & Hofmann, 2012). Most definitions reference *organizational culture* as a system of shared behavioral norms supported by values and beliefs that influence behavior in organizations (Ehrhart & Raver, 2014; Verbeke et al., 1998; Schein, 2017). What emerges from a review of the various definitions of organizational culture is a core set of content areas that includes values, beliefs, and behavioral norms.

Recent work has offered a systems perspective to understanding and managing organizational culture and change (Hartnell et al., 2019; Hrebiniak, 2013). Through this lens, an organization's values, beliefs, and norms can be positively impacted by other organizational dimensions, such as leadership, strategy, structure, and high-performance work practices (Hartnell et al., 2019). In practice, the author considers *organizational culture* to be a system of shared meaning derived from the dynamic interplay between values, beliefs, behavioral norms, and certain relevant factors. In a strong and effective organizational culture, the dynamic interdependencies between the organization's values, beliefs, behavioral norms, and relevant factors come together to project a clear organizational presence to stakeholders while enhancing performance and well-being. Internal stakeholders in particular come to think, feel, imagine, and act in alignment with the organizational culture. They have a shared meaning and common perception of their organizational culture.

Leadership is integral to helping an organizational culture become strong and effective (Schein, 2017; Hrebiniak, 2013).[1] Leadership has a significant impact on and positive relationship with organizational culture (Sarros et al., 2002; Sarros et al., 2005). Managerial leadership and culture influence key areas of organizational behavior that impact financial results of companies (Chatman et al., 2014;

[1]A debate comparing and contrasting management and leadership has occurred over more than three decades. In this article, the terms *managerial leadership, management, leadership, leader,* and *manager* are used synonymously.

Flamholtz, 2001; Flamholtz & Kannan-Narasimhan, 2005). These leadership-driven organizational behaviors include

- customer experience;
- people management;
- performance accountability;
- innovation and change management; and
- key leadership competencies and organizational processes, such as decision-making, communication, and conflict management styles.

Leaders can exert a positive or negative influence on organizational culture and performance, causing economic gains or losses (Flamholtz, 2005; Flamholtz & Randle, 2011).

This article offers an operational definition for managing organizational culture and a practice-oriented framework. In support of the growing interest for theory and conceptualization in the field of leadership to include facts and observations obtained from real-world practice, the author has developed an approach to strengthen the practice of managing organizational culture in workplace settings (Locke, 2007; Locke & Cooper, 2000). While there is an extensive array of definitions and conceptual formulations relating to organizational culture in the extant literature, there is little available that integrates the key practices associated with this process into one holistic, integrated approach. The intent of this article is to offer an integrated, practice-oriented framework for managing an organizational culture. This will help emerging leaders and experienced professionals advance their competence in this practice area while also serving as a resource for teachers and applied researchers.

Practice-Oriented Framework

As used in this article, the practice of *managing organizational culture* in the context of managerial leadership is operationally defined as identifying, documenting, and aligning core values and beliefs around a set of cultural factors and related behavioral practices, which are assessed for action planning and executed to impact desired outcomes.

Many opportunities exist for practitioners, researchers, and teachers to draw upon knowledge about managing organizational culture. The framework offered below applies this knowledge by building upon observations and experience in working with a broad range of managerial leaders and executive MBA students across many different settings.

Drawing upon nearly four decades of fieldwork, applied research, and consulting, together with relevant literature reviews, the author has made the following observations regarding managing organizational culture in the context of managerial leadership:

- Leadership exerts significant influence on organizational culture (Flamholtz, 2005; Hrebiniak, 2013; Schein, 2017).
- Top management teams impact an organization's culture.
- Corporate executives link organizational culture to firm value (Graham et al., 2016).
- *Organizational culture* refers to a system of shared meaning held by stakeholders that helps differentiate the organization from other enterprises (Schneider et al., 2013).
- Values, beliefs, objective factors, and behavioral norms/practices are key elements in an organizational culture (Detert et al., 2000; Robbins & Judge, 2018).
- An organizational culture can be defined, assessed, and managed around a select set of objective cultural factors (which exist on a continuum from low to high) which, when aligned with values, beliefs, and behavioral practices and effectively executed, can produce desired impacts.
- Organization members need to perceive and associate meaning with cultural values, beliefs, factors, and behavioral norms/practices for these to have an impact on behavior (Ehrhart & Raver, 2014).
- Positive relationships between culture factors and their behavioral correlates indicate that elements of an organization's system are interdependent (Hartnell et al., 2019).
- Factors that interact with and support organizational culture are potential levers to facilitate change (Schaffer, 2012; Schein, 2017).

- A configural approach offers the opportunity to review multiple culture factors/dimensions together or separately (Ostroff & Schulte, 2014).
- Organizational culture can be strong or weak and effective or ineffective (Chan, 2014).
- Culture is multilevel (Church et al., 2014).
- Organizational cultures emerge and can change over time (Schneider & Barbera, 2014).
- Organizations can enhance their efforts to recruit people by understanding their organizational culture and using this knowledge to attract talent (Chapman & Mayers, 2019).
- Socialization processes/practices can help employees adapt/orient to an organization's culture (Wang et al., 2015).
- An organization's culture can be a source of competitive advantage (Barney, 1986, 1991).
- Situational context, as a key dimension of leadership, plays an important role in managing organizational culture (Johns, 2006; Kerns, 2015b; Osborn et al., 2014).
- Organizational culture affects well-being and the health of an enterprise (Ballard & Grawitch, 2017; Kerns, 2018a).

Based on these observations and study of managing organizational culture, with the perspectives of a trusted advisor to leaders, industrial-organizational psychologist, business professor/scholar, and practitioner who has served on the workplace firing line, the author has developed an integrated framework to help emerging and seasoned managerial leaders enhance their competence at managing organizational culture. This framework, depicted in Figure 1 on the next page, has been applied in many settings, including work organizations, executive education programs/classes, and applied field studies. The model is practitioner friendly and conceptually tied to relevant literature on the study of leadership and organizational culture.

The framework addresses the need for a holistic, integrated, practical approach to effectively managing organizational culture. This evidence-based framework integrates six key components of managing organizational culture to more fully examine the dynamics relating to this process. Organizational culture management is less likely to be effective if the managerial leader focuses on fewer than all the components; the components need to be integrated into one coherent framework.

Identifying, Documenting, Aligning Values/Beliefs	Selecting and Defining Factors	Assessing Alignments and Prioritizing Factors	Developing and Communicating Change/ Developmental Action Plans	Executing and Optimizing Change/ Developmental Initiatives	Measuring and Evaluating Impact of Culture Management
• Complete the Schwartz value circumplex model (Schwartz, 1992; Schwartz & Boehnke, 2004). • Complete Values in Action Survey (VIA; Peterson & Seligman, 2004). • Complete Rokeach Human Values Survey (Rokeach, 1973, 1979). • Complete Values Profiling and Prioritizing Checklist (VPPC; Kerns, 2016b). • Target five core values. • Assess commitments and alignments to values.	• Complete Organizational Culture Profiling and Prioritizing Checklist (OCPPC; (Kerns, 2019). • Behaviorally define each selected factor. • Collaboratively reach consensus on alignments with values/beliefs.	• Use graphic scaling to assess each factor for alignments. • Collaboratively reach consensus on alignments with factors. • Prioritize which factors to target for change/ Development.	• Develop behaviorally specific action-oriented plans. • Ensure key practices associated with targeted areas are addressed. • Communicate change action plans targeting four key communication areas. • Obtain commitments.	• Clarify roles and responsibilities for change agents, as needed. • Apply performance management processes and tools to optimize change initiatives. • Link to and engage resources. • Provide coaching and experiential learning opportunities.	• Measure effectiveness of five action areas. • Evaluate effects of change management initiatives. • Apply Likert and excess scaling. • Assess using 360° surveys • Conduct behavioral observations. • Adapt for continuous improvement.

Figure 1. Practice-oriented managing organizational culture framework
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In the framework, the six components are presented in sequential order of the most basic provisions for managing organizational culture. However, the components are interrelated and are dynamic and interactive in practice.

Component I: Identifying, Documenting, and Aligning Values/Beliefs

Various assessment tools are available for identifying values. The Values in Action (VIA) survey is a 240-item questionnaire that assesses one's values/character strengths from a universe of 24 universal values (Peterson & Seligman, 2004). Upon completing this survey, respondents are provided with a list of their top five values. The Schwartz value circumplex model provides a review of 10 value types (Schwartz, 1992). A longstanding human values survey authored by Rokeach (1973, 1979), which divides values into terminal and instrumental values, is also a useful tool in helping individuals identify their values. Additional assessment tools such as the Values Profiling and Prioritizing Checklist (VPPC) can be used to help leaders identify and prioritize their core values (Kerns, 2017, 2019). The leader and his or her team also engage in a process to determine their individual and collective levels of commitment to the identified values and to the assumptions/beliefs associated with them. After commitments are affirmed, individuals are asked to assess how aligned they perceive their organization is with the identified and documented values and associated beliefs.

Component II: Selecting and Defining Factors

The leader and members of the leader's team are asked to complete the Organizational Culture Profiling and Prioritizing Checklist (OCPPC; Kerns, 2019). After the factors are agreed upon by the executive team, each selected factor is behaviorally defined. These behavioral definitions help ensure that each factor can be translated into observable managerial leadership practices. The leadership team also collaboratively reviews each of the factors and associated behavioral definitions to affirm agreement.

Component III: Assessing Alignments and Prioritizing Factors

After the cultural factors have been selected and behaviorally defined, it is important that these factors be assessed for alignments and prioritized for potential action planning. A variety of assessment tools can be used to measure alignments among team members and the selected factors. Graphic scaling has proven to be a useful method for assessing the various organizational alignments of cultural factors (Aiken, 1996). With this approach, individuals rate how much alignment they see between a specific factor and the organizational unit being rated. The process typically involves rating each factor on a scale of 1 to 7 (with 7 reflecting the highest rating). Each numeric rating anchor point is accompanied by a visual representation—two drawn circles—that reflect the degree of overlap between the factor and the organizational unit being measured. A rating of 7 finds the two circles completely overlapped, indicating total alignment, while a rating of 1 finds the two circles displayed as completely separate, indicating that there is no alignment. Once consensus is reached on the alignment of the selected factors, deliberations ensue to prioritize which factors should be targeted for change management and developmental action planning.

Component IV: Developing and Communicating Change/Developmental Action Plans

The development of behaviorally specific action plans helps advance performance accountability and clarity when the plan is executed. This process also assists in associating specific change management practices and developmental activities with targeted areas. Once behaviorally specific action plans have been developed and committed to by participants, they need to be effectively communicated with high impact (Kerns, 2016a). This communication is often advanced when leaders proactively address the key communication areas with their key stakeholders:

- "This is what is taking place."
- "This is where we are headed."
- "This is how we will make it work."
- "This is how it will impact you."

Component V: Executing and Optimizing Change/Developmental Initiatives

After action plans have been developed and communicated to stakeholders, a variety of useful things can be done to help optimize the change and developmental initiatives. For example, a roles and responsibilities matrix can be developed to ensure that individuals and groups are clear about how their roles in executing and optimizing the change initiatives. Also, elements of performance management systems can be applied to help optimize change and developmental enhancement efforts. In particular, implementation targets and milestones can be pinpointed using measures/metrics that can signal opportunities for savoring successes and/or learning from setbacks. Planned unexpected recognition can also be delivered to change agents for successfully executing their respective roles. (Planned unexpected recognition occurs when leaders periodically deliver unexpected positive reinforcement for actions that contribute to successful plan execution and optimization.) This process has proven to be helpful in increasing engagement and enhancing positivity. The specification of linking plans has also proven to be helpful in coordinating execution efforts, especially as they relate to linking or getting key people/stakeholders together (Labovitz & Rosansky, 2012). Coaching and providing performance feedback to change agents are also valuable performance management tools to enhance learning, which helps drive desired impacts. Learning from setbacks and savoring successes while also confronting poor execution can be advanced through effective coaching, performance feedback, and experiential learning activities.

Component VI: Measuring and Evaluating Impact of Culture Management

Measuring and evaluating the impact that culture management efforts have on the organization is a key component of this framework. This includes reviewing the effectiveness of the processes used in each of the six components in the framework. Questions such as "How effective were our efforts at aligning values, factors, and action plans?" or "What have we learned from our execution setbacks?" are inquiries that leaders need to ask themselves and their team members who are acting as change agents. Each of the change management and developmental initiatives need to be evaluated against the anticipated and desired impacts. These measurement and evaluation efforts can be supported by surveying key stakeholders and conducting structured, behavior-oriented interviews with them. It is also important that the feedback and themes gleaned from the various evaluation tools be integrated into a process of continuous improvement and ongoing learning. Efforts to manage and improve the effectiveness and strength of an organizational culture need to be seen through a continuous improvement and action learning lens.

Conceptually sound evidence-based frameworks and tools can help practitioners manage organizational cultures. A systematic and proven practice-oriented framework and management approach like the one provided above can help leadership practitioners, especially C-level executives, and their teams execute their plans and achieve desired outcomes when managing organizational cultures.

Application Value and Implications

Work relating to the managerial leadership practice of managing organizational culture has application value and implications for practitioners, researchers, and teachers. All three groups contribute to the growth and development of emerging and seasoned leaders. In particular, practitioners can benefit from having practical frameworks and tools to help them better manage their own efforts at managing organizational culture. A discussion of the application value and implications of the proffered framework across practice, research, and teaching domains follows.

Practice Domain

The managing organizational culture framework described above can serve as a practical guide for productive conversations and development. While the components are separated for clarity and discussion purposes, in practice, the six-component framework forms an integrated and interactive whole. To help operationalize the managing culture framework, various behavioral skill areas provide opportunities to enhance a managerial leader's competence in managing culture within the components of the framework. A managerial leader, independently or in consultation with others, can consider eight behavioral skill areas, each of which is essential to managing organizational culture:

- identifying, affirming, and aligning behavior with a set of core values;
- collaborating with others by showing openness and supportive behaviors;
- fostering engagement and commitment;

- showing decisive problem solving when selecting factors and formulating action plans;
- communicating with high impact;
- focusing change efforts on the most important target areas that can be influenced;
- measuring the effectiveness/impacts from the process of managing organizational culture; and
- linking with needed resources, especially people.

The above index of behavioral skill areas can serve as a springboard for conversations with managerial leaders about their skill level in managing organizational culture and help in identifying areas for improvement within the context of the framework. Through these discussions and upon reflection, action plans may be developed which include conducting more formal forms of assessment such as 360-degree surveying. Managerial leaders may also address these behavioral skills with reports when coaching them to enhance their skill in organizational culture management.

The Organizational Culture Profiling and Prioritization Checklist (OCPPC) has proven to be a useful facilitation tool for C-level executives and their teams in discussing the different factors that influence organizational culture (Kerns, 2019). These interactions often help leaders more fully see and appreciate how organizational factors affect an enterprise's culture, both individually and collectively. For example, striving to enhance an organization's customer orientation also requires that accountability be considered so that service promises made to customers are supported by an effective performance management infrastructure. The process of selecting and defining culture factors for assessment and potential action planning also provides leaders with a practical and more focused way to consider key aspects of organizational culture. Leaders in client organizations have noted that this process helps break down the concept of organizational culture into practical terms and manageable action areas. To bring additional practical utility to the practice of managing organizational culture, the author often presents leaders and their teams with the graphic displayed in Figure 2.

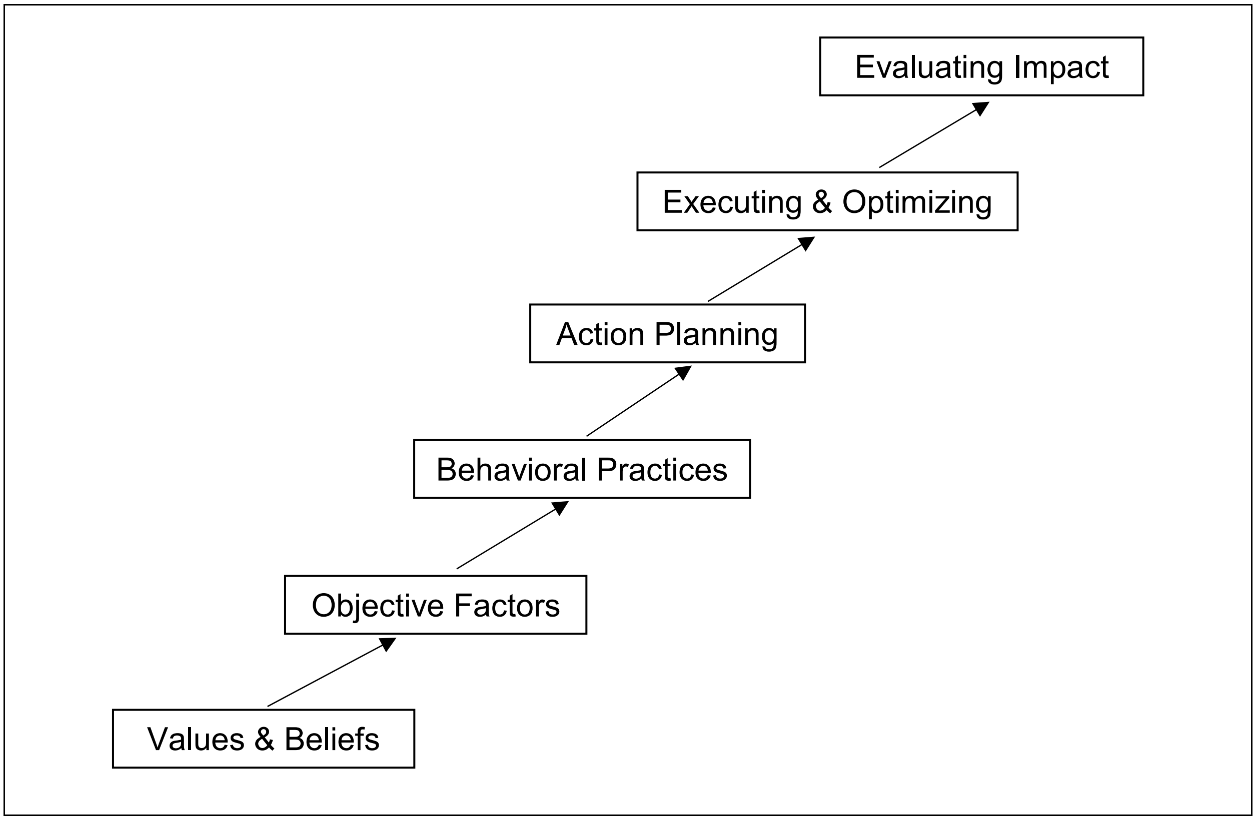

Figure 2. Key organizational culture management building blocks

This figure provides a visual display of the key concepts or building blocks represented in the practice-oriented managing organizational culture framework (Figure 1). This visual summary helps leaders and their teams to quickly see the essential elements that they will be endeavoring to manage in order to strengthen and/or increase the effectiveness of their organizational culture. Typically, this figure is introduced to leaders prior to implementing a program for managing organizational culture such as the one represented by the framework offered in this article. When reviewing and discussing these building blocks with practitioners, it is valuable to note the important role that alignment plays within and between each of the individual building blocks (Labovitz & Rosansky, 2012; Levenson, 2015). For example, core values need to be aligned with practices that are selected as targets for action planning. Also, it is important to note that these six building blocks, like the components detailed in the practice-oriented framework are interrelated and dynamically interact in practice.

Research Domain

The primary focus of this article is on providing practicing managerial leaders with additional understanding and perspective to support managing organizational culture. There are, however, areas that could likely benefit from additional research (Chatman & O'Reilly, 2016). For example, it would be of interest to further investigate additional practice-oriented frameworks intended to enhance practitioner knowledge and skills in managing organizational culture. Further examining frameworks that integrate key components such as the key organizational building blocks (Figure 2) and practices into a practical and coherent whole would be useful.

The current framework for managing organizational culture provides a multifaceted practice-oriented model (Components I-VI) for applied researchers to investigate further. This future work could include examining the individual components of the framework as well as the interactions between specific parts. In particular, it seems valuable to more fully explore the interaction between espoused organizational values and the core values held by individual leaders who are managing organizational cultures. Based on the work being done with managing core values, it would be of interest to know how alignments and misalignments between organizational values and individual values influence efforts at managing organizational cultures (Labovitz & Rosansky, 2012). It would also be helpful to have a better understanding of how spheres of influence outside of an organization's internal operating environment affect the successful execution of frameworks designed for managing an organization's culture. This work could likely benefit from the research being done around the leadership dimension of situational context (Kerns, 2015b).

The work relating to situational context can also be applied to investigating the multilevel alignment and engagement within an organization's internal operating structure (Mathieu & Chen, 2011). This work would likely be instructive for leaders seeking to effectively manage their organization's culture. A better understanding of the dynamics within and among organizational levels as they relate to managing culture would be useful. These organizational linkages and related dynamics also connect to the work being done relating to well-being in the workplace (Kerns, 2018a; Oades & Dulagil, 2017). The connections between organizational alignment, engagement, and well-being are of interest to managerial leaders seeking to enhance the strength and effectiveness of their organizations' cultures and could benefit from additional empirical exploration. Given the extensive work on the negative impact of employee disengagement on organizational well-being and performance, it seems especially helpful for researchers to more fully explore the dynamic interplay between engagement, alignment, and practices intended to manage and influence organizational culture.

How managerial leaders' competence in using interpersonal influence skills to affect the effectiveness and strength of organizational cultures is an area ripe for further investigation. While managerial leadership competencies have been extensively reviewed, extending this work to the study of the effectiveness of organizational cultures would be beneficial (Kerns & Ko, 2014). Further study of the relationship between a leader's interpersonal communication, conflict management, and persuasion skills on the effectiveness and strength of an organizational culture would be illuminating. More broadly, further investigation into managerial leadership competencies and the individual differences of organizational leaders and how these leadership dimensions affect an organization's culture would be helpful. For example, investigating leadership experience and how it influences a leader's execution of specific competencies, such as direction setting and problem solving within the context of managing an organization culture, would be of interest (Kerns, 2018b).

Finally, the emerging interest in applying a configural approach to studying organizational culture is promising (Ostroff et al., 2013; Ostroff & Shulte, 2014). This approach of identifying the pattern or profile across factors or dimensions of conceptually different constructs could help in empirically investigating the current practice-oriented framework. It would be of interest, for example, to examine how the selected factors such as innovation, accountability, and collaboration individually and collectively relate to organizational effectiveness. The methods associated with a configural approach would help leaders and their organizations study an entire managing culture framework and its individual components. This type of granular analysis would help practitioners and researchers gain additional insights into the profiles and patterns of organizational cultures. A better understanding of these patterns or profiles and how they affect organizational functioning would be especially helpful. It may be that certain configurations are more effective than others in helping leaders achieve desired outcomes.

Teaching Domain

The teaching of leadership can be facilitated by having practical frameworks to offer emerging and experienced practitioners seeking to enhance their effectiveness. Some applications used in organizational settings have been adapted to the business school classroom and to leadership development programs outside of academia by the author when facilitating the learning of frameworks and practices associated with managing organization culture.

Application of the managing culture framework offered in this article has been facilitated by using experiential exercises to help adult learners better understand and apply this framework. For example, the key organizational culture building blocks graphic (Figure 2) has been successfully employed to engage students enrolled in leadership-oriented MBA classes to better understand and apply the key concepts covered in the framework (Figure 1). Typically, students in small groups are given a list of the six building blocks and ask to configure them sequentially in a way that seems most effective and logical to apply in their own organizations to effectively manage their organizational culture. This experiential activity usually facilitates fruitful discussions about how to go about managing an organization culture to increase desired impacts. It also offers learners a big-picture understanding of the key ingredients a managerial leader should consider when addressing the topic of managing an organizational culture. Students also emerge from this experience with a more integrated and clearer understanding about how to generally go about systematically reviewing an organizational culture.

As a follow up to the above exercise, an experiential activity using the practice-oriented managing organizational culture framework is introduced. This mini-workshop facilitates participants in identifying, selecting, and behaviorally defining a set of five factors that they believe would contribute to creating an organizational culture with high performance and high well-being. Small groups are given a copy of the practice-oriented framework (Figure 1) and a copy of the six-building block graphic (Figure 2). They are instructed to consider all six components in the managing organizational culture framework and apply it to a specific organization (typically one of the group members' current organizations). This mini-workshop has proven to be beneficial in helping participants apply the managing organizational culture framework in ways that draw upon their real-world workplace experience. The discussion periods that follow the small group working sessions yield many useful observations and perspectives about how to consider addressing the management of an organizational culture to enhance performance and well-being. Frequently, participants realize how challenging it is to identify, define, and specify practices across a set of factors to drive desired outcomes such as high performance and high well-being.

An additional helpful tool to apply following this exercise is to have participants complete an Organizational Culture Profiling and Prioritizing Checklist (Kerns, 2019). This tool helps participants obtain a broader universe of potential organizational culture factors to target for development and action planning as part of managing organizational culture. This activity is aligned with the interest in having workplace assessments to be applied in business schools (Yu, 2010).

Some Challenges

Putting the managing organizational culture framework into practice presents a variety of challenges. Given the paucity of evidence-based frameworks for practitioners to review and apply when addressing the process of managing organizational culture, it would be valuable to challenge practice-oriented applied researchers to explore additional approaches to help leaders effectively manage organizational cultures. Leaders and their teams may pursue the development of additional approaches for managing organizational culture as part of a thought leadership process (Kerns, 2018b). Beyond the framework presented here, applied-minded scholars and/or evidence-based oriented practitioners are further challenged to develop additional programs to help leaders assess, manage, and measure impact when endeavoring to manage an organizational culture. As part of this effort, leaders are challenged to more consistently and explicitly integrate well-being as a desired outcome. Bringing more attention to organizational well-being as an outcome of effectively managing an organizational culture supports the growing recognition of how well-being is integral to the health of organizations (Ballard & Grawitch, 2017; Tomkins & Pritchard, 2020).

Leaders need a practical and results-oriented methodology to measure and evaluate the impact that their efforts at managing an organizational culture are having on desired outcomes. Given the scarcity of sound, practice-oriented approaches for measuring culture management outcomes, the author encourages managerial leaders to consider using the linkage research model (LRM) to measure and evaluate effectiveness (Wiley, 2010; Wiley & Campbell, 2006). This method systematically helps leaders and their organizations focus on desired and important measures/results. The areas that are sequentially linked and measured include managerial leader key results → employee results → customer results → business results. Kerns (2002) offers a practical review and application of the LRM methodology. The emerging configural approach, as noted previously, of identifying patterns or profiles of different organizational culture factors is also being explored by the author as a way of assessing a leader's impact on changing an organizational culture across selected key dimensions such as innovation and customer experience (Ostroff & Shulte, 2014). Managerial leaders are challenged to identify and use practice-oriented methodologies that assist them in measuring and evaluating their efforts at managing organizational culture.

Closely associated with the challenge of measuring and evaluating impact is the need for managerial leaders to ensure that they communicate effectively regarding culture management strategies, action plans, and outcomes with key stakeholders. When applying the current framework, managerial leaders should consider, for example, how the use of communication technologies and social media influence their work in managing organizational culture (Phelps, 2014). Keeping individuals, groups, or the entire organizations in the loop regarding changes that may occur as a result of work related to managing organizational culture is critical. Technology-assisted communication highlights the importance for leaders to recognize, understand, and leverage available technologies to communicate with key stakeholders. It is also important that leaders understand how their key stakeholders perceive the key features and outcomes relating to an organization's culture and associated change management efforts. It is likely that this understanding, coupled with the use of effective communication strategies including technology assisted approaches, will enhance a leader's effectiveness at managing organizational culture and change. This may be particularly relevant when a leader is managing individuals across different generations, cultures, and geographical locations.

Managerial leaders are also challenged to identify and develop effective interpersonal influence competencies to successfully put the managing organizational culture framework into practice. While there are analytics involved in the process, especially relating to assessing alignments, factors, and impact, interpersonal skills are critical to successfully implementing the current framework. Field experience has shown conflict management, collaborative facilitation, and high-impact communication skills are especially valuable. In implementing the current framework, interpersonal influence competencies (often considered soft skills) work to support and help deliver the more quantifiable outcome metrics. Managerial leaders are challenged to understand how their individual differences affect their success in executing competencies such as interpersonal influence (Kerns, 2015a). A fuller understanding of who they are as leaders when endeavoring to implement the current framework will likely enhance their effectiveness at executing this approach. By better understanding and indexing their own interpersonal influence skills, they will likely be more effective at linking with the necessary resources, especially people, to successfully manage organizational culture and change.

Finally, it will be challenging for managerial leaders to create and sustain alignment and engagement when managing organizational culture and change. It is important for leaders to be able to assess key stakeholder groups for their alignment with values, key cultural factors, and action plans. These assessments, along with necessary alignment adjustments, are an ongoing process. Managerial leaders need to display competence in linking resources to needs and demonstrating interpersonal influence skills. This challenge extends particularly to global organizational leaders who must align and engage across diverse cultural boundaries (House et al., 2014).

Focusing on the challenges of exploring additional frameworks, seeing well-being as an outcome, measurement, communication with stakeholders, interpersonal influence, individual differences, and alignment will enhance our knowledge and execution capabilities in managing organizational culture and change. With the passing of time, additional challenges for practitioners, applied researchers, and teachers will surface. Effectively addressing these challenges will help leaders enhance their understanding, knowledge, and skill in managing organizational culture and the associated dynamics.

Conclusion

The development and application of frameworks to assist leaders in effectively understanding and managing organizational culture will be valuable to advancing the practice and study of leadership. By offering systematic approaches that build upon practice-oriented frameworks, additional resources can be developed and applied to help leaders manage organizational culture and related challenges. As this work continues, there will be a need for additional practice-oriented frameworks and related tools to help managerial executives. With effective execution, leaders and their organizations will help create and sustain organizational culture.

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Charles D. Kerns, PhD, MBA, is a professor of applied behavioral science at the Pepperdine Graziadio Business School who has nearly four decades of business, managerial leadership, teaching, and consulting experience. Through his private consulting firm, Corperformance, Inc., he has implemented management and organizational development programs and systems to help companies from many industries optimize their results. He is a trusted advisor to C-level executives and their teams. He joined the Pepperdine Graziadio Business School in 1980 as an adjunct faculty member, and since 2000 has been a member of the full-time faculty. He has served as the associate dean for academic affairs. Dr. Kerns holds a Diplomate, ABPP, in both Industrial-Organizational Psychology and Organizational-Business Consulting Psychology. He earned his MBA from Pepperdine University and PhD from the University of Maryland. His research, publications, and work focus on helping managerial leaders and their organizations apply evidence-based behavioral science frameworks and tools to achieve high performance with high well-being. He can be reached at charles.kerns@pepperdine.edu.