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A CROSS CASE THEMATIC ANALYSIS OF SYSTEMIC LEADERSHIP DEVELOPMENT

MATTHEW WILLIAM ANDERSON

A thesis submitted in partial fulfilment of the requirements of Robert Gordon University for the degree of Doctor of Philosophy

OCTOBER 2016

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ACKNOWLEDGEMENTS

King Charles II may have lamented taking an 'unconscionable time a-dying'; this thesis took an unconscionable time a-birthing. Nonetheless, the challenge of furthering a paradigm of leadership development which espouses social and environmental necessity – rather than developmental egocentrism – is a noble endeavour, and this thesis aims to provide a humble contribution to the debate.

Earnest appreciation and thanks to Professor Dennis Tourish at Royal Holloway for his wise navigation through the geographies of leadership literature and epistemologies, and to Professor Peter Strachan and Dr. David Jones at Aberdeen Business School for their diligent local supervision. Also, many thanks to all the case study organisations and participants that agreed to take part in the research, and for their full engagement and rich contributions.

Mais plus important encore, je suis reconnaissant de la patience et de la fortitude de ma famille, tant du côté Français que du côté Écossais; ils m'ont inspiré tout au long de ce chemin. À ma femme et mes filles.

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Matthew William Anderson

Doctor of Philosophy

A Cross Case Thematic Analysis of Systemic Leadership Development

Abstract

This research examined which factors of influence contributed towards efficacious systemic leadership development, within case studies in the energy and military sectors, and identified and explained common underlying themes and factors which could help formulate future interventions, as well as enhance extant theoretical knowledge.

The literature showed that key challenges exists in identifying what contribution leadership development makes to enhancing organisational leadership, and as such, social capital and systemic development. To focus the research, specific definitions were constructed, as to what sort of effective leadership positively impacts upon organisational leadership; which cardinal themes of leadership development traverse interventions, namely Delivery, Contextualisation, Performance, Impact and Values integration; and what constitutes systemic leadership development.

A Social Constructivist position was adopted which explains the nature of the phenomena underlying systemic leadership development.

Two case studies, across the two sectors, and a validation study, were conducted involving twenty four key people, representing all levels of programme involvement: including programme owners, managers, trainers and participants. The data was analysed using a conceptual analytical model.

The results identified sixty-one factors of influence, catalysts and inhibitors, and proposed a range of thematic theoretical solutions, across the cardinal themes of the analysis, which provide empirical and conceptual recommendations. The six theoretical solutions were: *Select Superhero Trainers (Delivery), Make Context King (Contextualisation), Challenge Pascal's Problem (Performance), Avoid Isolationism (Impact), Create Leaders with Heart (Values)* and *Promote People Centrality (Organisational Leadership)*.

The outcomes of the research indicate relevance for sectoral practice, as well as leadership development theory. Future research might extrapolate greater depth and causal relationships within systemic leadership development, across the cardinal themes and systemic definitional elements.

Keywords: Leadership Development; Systemic; Social Constructivism; Case Study; Cross Sector

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CHAPTER ONE

RESEARCH INTRODUCTION, SCOPE & STRATEGY

PART ONE – INTRODUCTION

1.1 Introduction to the Research Context

This chapter introduces the research and describes the rationale and strategy which supports the scope and conduct of the research.

The rationale for the study is to conceptually and empirically explore the leadership development approaches of two sectoral case studies, across energy and military sectors, and to identify and explain common underlying themes and factors which could help formulate future interventions. This doctoral research programme was instigated by Aberdeen Business School, with the intention of advancing conceptual and empirical knowledge of leadership development in the energy sector. The energy sector is the prime sector in North East region of the UK, and is therefore of paramount interest to the academic community.

The timing of this study is of particular significance, as leadership has emerged as a key issue for the energy sector, as it wrestles with significant challenges in sustaining future performance, such as increasing operating costs, ageing assets, decreasing production and low oil price (Fointama, 2015). These challenges have resulted in strategic shifts towards workforce reductions, an increased focus on sustainable development, more effective performance management, greater innovation and change management (Marcella & Rowlands, 2013; Wood, 2014).

Consequently, if the energy sector is to maintain and improve its commitment to developing world-class leaders, in order to meet these challenges, a deeper understanding is needed of what can be done by way of leadership development to foster effective organisational leadership and build enhanced organisational capability. In particular, this study aims to compare and contrast leadership development approaches and methodologies of the military, with a view to identifying any cross-sector lessons to support the energy sector in its future developmental practices. Furthermore, what valuable lessons, if any, can be applied to help facilitate future leadership development programmes, across both sectors and beyond?

The researcher is a former senior manager within the energy sector and former British Army officer with significant practical experience of leadership development in both sectors (see **Appendix A** for further details).

1.2 Research Problem: A Critical Thematic Inquiry into Systemic Leadership Development Efficacy

The obvious initial challenge is to inquire whether or not leadership development makes any significant contribution to enhancing organisational leadership. Indeed, at the close of the previous century, researchers McCall, Lombardo and Eichinger (1996) lamented that as little as 10 percent of leadership development learning was derived from formal training. Dolefully, decades later, leadership development initiatives are still, in the main, reported as unsatisfactory, to varying degrees ineffective, and not having a desired effect on organisations (Bolden & Kirk, 2006; Tourish & Pinnington, 2007; Howard & Wellins, 2008; Day, 2011). So, *why are interventions not having the desired impact on leadership development within organisations?*

The research problem is one of critical inquiry into identifying why leadership development initiatives are not having significant impacts within organisations, and to empirically shed some light onto what the most efficacious approaches are when conducting leadership development; and to demonstrate how a deeper understanding of empirical research might contribute to future studies, phenomenological sense-making and pragmatic application.

It is not surprising that the question "*what are the most efficacious approaches?*" rings loudly in leadership development literature, as studies repeatedly report dissatisfaction with the application and execution of interventions (Howard & Wellins, 2008; Zeng, 2012; Bregman, 2013), and in some research cases up to 80 percent of organisations can measure no impact of leadership development at organisational levels (Tourish & Pinnington, 2007). Shedding light on this mystery could contribute considerable knowledge to wider understanding and assumptions in the domain. This research takes that challenge on.

In order to rigorously test current leadership development approaches for efficacy, this research must clearly set out a research strategy and framework which maintains the highest possible standards of academic rigor and inquiry.

Fundamental issues for this research problem were:

- Define what is meant by leadership development and what might be regarded as desirable impacts of such interventions on leaders and their organisations;
- Identify from key relevant literature what are the cardinal themes and factors for leadership development; and

- Develop a framework for inquiry that will critically analyse the factors of influence which determine the efficacy of approaches

It is evident from extant literature that many contradictions and tensions exist in corporate leadership development activity (Mabey & Finch-Lees, 2008; Mabey, 2013). This may in large part be due to a lack of consistency and clarity, applied by researchers, across working definitions of both leadership and leadership development (Mabey, 2013). As this research is concerned with the impact of developmental interventions within organisations, the view is held that the challenge of leadership is the generation of more collective action in order to resolve systemic problems (Grint, 2005; Senge et al., 2010; Jones, 2011). This systemic view, means that leadership must positively affect social and environmental factors, in order to generate collective action. Thus leadership is nested in social contexts (Gentry & Martineau, 2010). This notion permeates both working definitions of leadership and leadership development in this study.

As stated, providing a working definition of leadership development is problematic, with confusion reported in the literature (Day et al., 2009; McCauley, Van Velsor & Ruderman, 2010) between what is meant by the two key sub-facets of leadership development: *leader development* and *leadership development*. Whereas, the former focuses on individual development, aimed at increasing human capital; the latter focuses on systemic, organisational development, at the social level, aimed at increasing social capital. This differentiation within the standard definition and its impact on this research is discussed in detail in Chapter Two.

Consequently, this research focuses on the impact of leadership development interventions at the social capital and organisational development level; an area until now which has received considerable neglect (Day, 2011; Mabey, 2013). A concise, more clearly reconciled definition has produced a delineated concept: s*ystemic leadership development*. The differentiated definition is aimed at drawing greater attention to the desired systemic impact of the interventions.

With regards to breaking down further key themes and factors for leadership development interventions, an extensive review of relevant literature on leadership development and related themes revealed certain cardinal themes. Firstly, that *delivery* is vital: specifically, how the interventions are being delivered and how effective they are. Secondly, that *contextualisation* should be integrated within interventions, so that the desired competencies and behaviours are appropriately situated in organisational realities. Thirdly, that assessing and improving the *performance* of participants on leadership development interventions is a core developmental component. Fourthly, that the *impact* of interventions must be positive on both individuals' and organisational development.

Fifthly, that an *integration of values* into leadership development positively influences the culture and collective behaviours of an organisation, and is a key systemic component. Lastly, there was an additional factor affecting leadership development, though not intrinsic to the developmental experience, it plays a significant role in framing and influencing the learning experience: namely, what is the desired nature of organisational leadership; what critical situational factors affect effective leadership practice back in the real-world of organisational life.

These themes are discussed in detail during the literature review in Chapter Two.

In order to critically analyse the research problem, an analytical framework was constructed to interrogate how these themes relate to the working definition of systemic leadership development. The framework supported a systematic process of identifying *Factors of Influence (Fi)* which interact between the themes and systemic leadership development. This interaction provided the principle research question, outlined below: *Systemic leadership development is influenced by which factors, across the cardinal themes*? The factors of influence were differentiated into two categories: *Catalysts* and *Inhibitors*. These were measured in terms of inference and causality, as expressed in the respondents' interview data and appropriate triangulation and methodological analysis. The analytical framework is discussed in detail in Chapter Three.

There was a scale and scope issue with the research problem: in that only a finite amount of data could be collected in a doctoral study; as each of the case study datasets was significant. Therefore, the scope of inquiry was narrowed down on several counts; namely, that it would be a cross-sector, cross-case analysis of two sectors; that the type of leadership development programme selected would be limited to formal middle-management interventions; and also the amount of case studies be limited to two (one per sector); with the addition of a differentiated validation study to triangulate case study findings (discussed in Chapter Three).

Finally, with regards to dealing with the research problem, the socially-constructed nature of the research phenomena required that multiple perspectives and accounts of the investigated leadership development interventions be ascertained, as this would represent the inherent contingency within any emergent theories, which are organisationally social- and context-situated. Therefore, multiple levels of actors were engaged: from senior board sponsors of the interventions to intervention-owners to trainers to recipients.

1.3 Research Aim and Objectives

In order to address the Research Problem, a Research Aim was derived, as well as a series of Research Objectives to ensure the problem was comprehensively addressed and so that the focus of analysis remains consistent with factors discussed above.

Translating the Research Problem into a Research Aim can be expressed as:

"To critically conduct an in-depth cross-sector case study analysis of cardinal themes of leadership development, by identifying factors of influence in generating efficacious systemic leadership development, and thereby make empirical and conceptual recommendations which both enhance extant knowledge and improve future praxis."

To achieve this aim a series of Research Objectives was identified and listed below in **Table 1.1**.

	OBJECTIVES	RELATED CHAPTER
RO1	**To discuss comparability, in terms of organisational and leadership contexts, between the military and energy sectors**	Chapter 2
RO2	**To critically review and identify from relevant literature the key themes of leadership development for analysis**	Chapter 2
RO3	**To develop working definitions of leadership and leadership development for analysis**	Chapter 2
RO4	**To identify the phenomenological nature of the research problem and address ontological and epistemological issues**	Chapter 3
RO5	**To develop an analytical framework for critical thematic analysis**	Chapter 3
RO6	**To critically evaluate across military and energy sector case studies the five cardinal themes, identifying factors of influence in generating systemic leadership development**	Chapter 4
RO7	**To utilise a Validation Study to triangulate findings from the case study analyses**	Chapter 4
RO8	**To make empirical and conceptual recommendations which both enhance extant knowledge and improve future praxis, for generating systemic leadership development, with regards to the cardinal themes**	Chapter 5

Table 1.1 – Research Objectives. Source: Author

1.4 Research Questions

As the research journey progressed through background- and focal-theory development - Research Objectives One to Five (RO1-5) - the researcher sought to confirm that sufficient depth of understanding and clarity had emerged from each respective objective, prior to progressing onto the subsequent objective, leading closer to achieving the Research Aim.

There are two Research Questions which specifically address the components of the Research Aim and thus the Research Problem.

These questions follow the cardinal themes of leadership development (RO2); analyse the targeted definitional phenomena (RO3); apply the epistemology (RO4); using the analytical framework (RO5); via case studies and validation study (RO6-7); and identify recommendations and theoretical solutions (RO8).

Thus, the first Research Question (RQ1) deals with Research Objectives Two to Seven (RO2-7):

> RQ1. *Systemic leadership development is influenced by which factors, across the cardinal themes of inquiry?*

The second Research Question (RQ2) deals specifically with Research Objective Eight (RO8):

> RQ2. *What recommendations and theoretical solutions have emerged from the findings with regards to generating efficacious systemic leadership development?*

The research questions were simplified to two, as extrapolating the same explanatory and inferential questions across each of the cardinal themes or indeed the case studies would have been an unnecessary semantical multiplication. However, the parsimony of questions served this research well, as it focused the researchers mind within defined and purposive control boundaries, and allowed products of RQ2 to be entirely iterative products of RQ1. Any outcomes of RO2 are rooted in the subjective inferential views of respondents, identified as influential factors, by them, in RO1. The inherent scope limitations in the research questions also mitigates the possible pitfall of attempting to design the ideal leadership development programme, which would be a fraught venture, as it would have to over-generalise to the point where all leadership programme needs are relatively consistent.

1.5 Research Strategy

Whilst Chapter Three of the thesis develops in detail the research strategy and applied methods used to address the research aim and objectives, this section outlines the main attributes of the strategy, by discussing the essential methodological and research design considerations; as well as outlining the research journey and presenting a schematic structure of the thesis.

1.5.1 Methodological and Research Design Considerations

Taking into account the research challenges briefly presented in the above discussion, there were various possible options for the research strategy. One option could be to utilise a quantitative approach, through broad, detailed and consistent surveying, in order to achieve Realist or Positivistic deductions on the inherent nature of the research problem. For example, this may prove effective if the researcher were to review pedagogical methods against certain acquired competencies (Day 2011; Mumford, 2011).

However, as the initial research inquiry progressed and the nature of the targeted phenomena emerged, a problematic, indistinct and often inconsistent phenomenological landscape materialised. What emerged was a view of leadership development that is more akin to a sense-making process, where a research strategy was required that is capable of tracking a range of influences and subjective constructions, across social groupings (Jones, 2011). This meant that harvesting the right degree and type of detail, in comparative and consistent forms, over vast and often unknown parameters would have been extremely difficult; furthermore, it may have be impuissant in accurately shining light on the true nature of the research phenomena.

Subsequently, in order to understand and provide meaning to the phenomena, the research design needed to focus on extrapolating depth rather than breadth (Given, 2008; Blaxter, Hughes & Tight, 2010). Such depth could only be extrapolated by examining the phenomena in terms of the perceptions of those involved or affected and critically analysing their representations of reality through the self-generated narratives of their perceptions (Grint, 1997; Ritchie, 2010). Contingency and subjectivity were inseparable intrinsic inhibitors for the research, and must be embraced and adequately investigated, in their micro and macro contexts, and therefore a qualitative approach was not only appropriate, but ideal for coming to terms with meaning and emic (i.e. from the perspective of the subject, rather than observer / researcher) perspectives (Harris, 1976; Lincoln & Guba, 1994).

A critical review of the research phenomenology revealed that Social Constructivism, as an ontology and epistemology, most accurately provided an explanatory paradigm. This view of leadership development, which is nested within a learning environment, and within a paradigm which

fundamentally accounts for the multifarious interaction of the programme participants, the broader social group within which they co-exist, and the domain nature of the wider social context or community (Grint, 2005; Fairhurst & Grant, 2010). This phenomenological approach to viewing the research contributed to all aspects of the focal theory, data gathering and analysis and inductive reasoning.

In utilising social constructivism, and considering the research objective of evaluating cross-sector leadership development interventions, it was identified that applying the Case Study method, using semi structured interviews with respondents, observations and artefacts, presents a significant, efficacious qualitative method. It is capable of identifying comparative and manageable real-world examples of the research phenomena, and provides a praxis orientation. This method also allowed for the collection of deep and rich data, which had strong contextual linkages and socially-constructed perspectives. Despite issues in utilising this method the benefits were significant and further supported by applying Eisenhardt's (1989) case study validity taxonomy and by utilising a Validation Study method; the purpose of which was to provide extrinsic cross-case observations and narratives of actors who have conducted leadership development in both respective sectors. These additional extraneous perspectives provided an important triangulation method for validating cross-case findings and emerging theoretical solutions.

1.5.2 Outline of Thesis Structure

The thesis compromises eight parts across five chapters which describe the research journey from the identification of the research problem and its subsequent scope and strategy, the development of a conceptual framework to analyse the research phenomena, the processes utilised in the collection and analysis of data, and the research discussion and implications which emerged as a result of the consolidated processes.

The research journey is schematically represented in **Figure 1.1**.

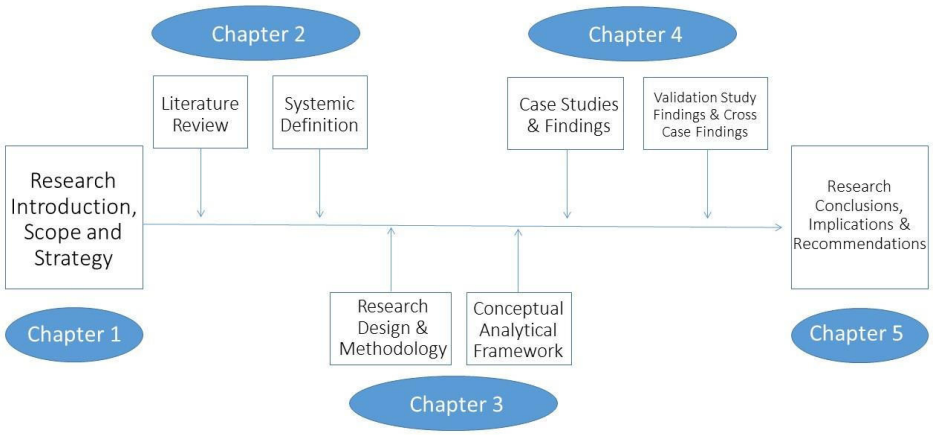

Figure 1.1 - Schematic Structure of the thesis. Source: Author

Expanding on the schematic, **Table 1.2** below describes the content of each of the chapters in brief overview and summarises progress towards answering the research aim and objectives.

Chapter	Chapter Content
Chapter 1	Identifies the research journey, by outlining the key considerations for the research (aim, objectives and questions), with regards to progressing from problem to solution (see Figure 1.1).
Chapter 2	Analyses sector comparability issues and commonalities for leadership, and identifies what effective leadership is, generating a clearer idea of what sort of leadership should be developed through interventions. Leadership development is differentiated from management and from Leader Development and a working definition is constructed to analyse specific phenomena. Cardinal themes of leadership development are drawn from the literature. A working definition of systemic leadership development is constructed to allow for specific critical analysis of social-capital, organisational impacting leadership development.
Chapter 3	Identifies an appropriate ontological and epistemological position from which to examine the phenomena. Identifies the strategy for data collection and analysis. Describes the case study process and application of an extraneous validation study for testing case study findings. Derives a conceptual analytical framework to apply to the Research Questions, in order that the phenomena be analysed effectively.
Chapter 4	Conducts within-case analyses of two case studies and a validation study. Conducts a cross-case comparative analysis of the studies and draws out key findings, in the light of extant literature, and identifies potential theoretical solutions for achieving the Research Aim.
Chapter 5	Summarises the key findings and considers the implications for generating systemic leadership development.

Table 1.2 - Thesis Chapter Contents. Source: Author

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CHAPTER TWO

LITERATURE REVIEW

2.0 Introduction to the Literature Review

This chapter critically reviews pertinent literature for addressing the Research Problem, Aim and Objectives.

Part One critically discusses the comparability issues of sectors.

Part Two discusses what leadership is, and what is considered effective and 'good' leadership (namely SAEI perspective), and how it differs to management; followed by an overview of leadership across the two sector contexts.

Part Three covers a thorough critical review of leadership development literature revealing current practices and theoretic knowledge, identifying cardinal themes for moving forward with theoretic contributions within the domain.

Part Four generates a differentiated working definition of systemic leadership development, from the literature, against which the impact of the cardinal themes will be analysed.

The chapter is outlined schematically (**Figure 2.1**), with the respective numerical sections and sub-sections identified.

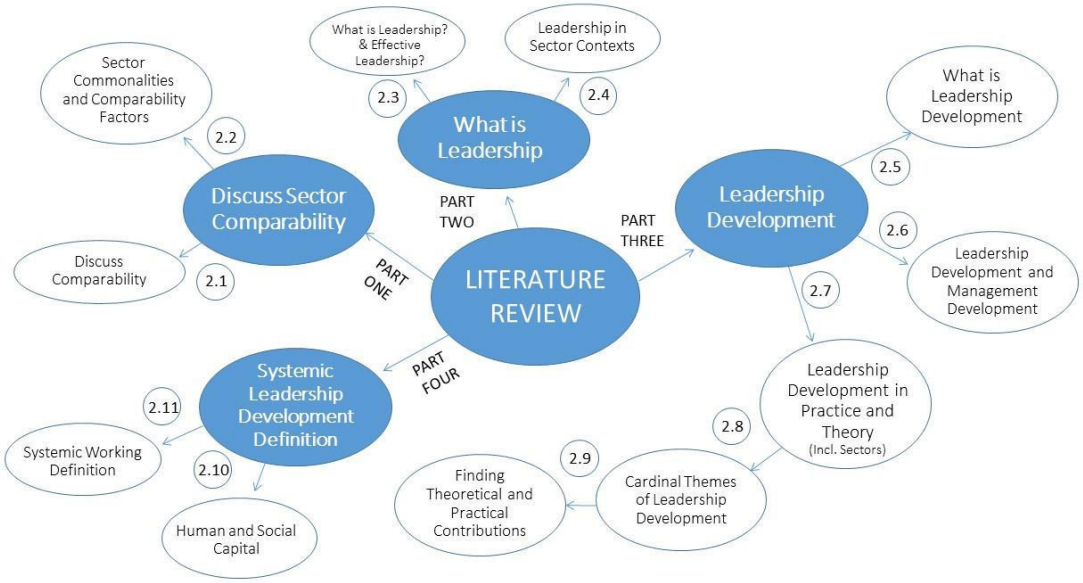

Figure 2.1 - Literature Review Schematic. Source: Author

PART ONE – SECTOR COMPARABILITY ISSUES

2.1 Sector Comparability Issues

It is important for this research to demonstrate a reasonable degree of commonality and comparability between the respective sectors, in order to justify relevance and reliability with regards to extrapolated findings and recommendations.

Equally, an outline description of the respective sectors, and narrowing of parameters, will assist in contextualising the research analysis. It also allows the identification of comparative case studies. These summaries will provide a general understanding of *what we mean* when referring to the sectors.

2.1.1 The "Military Sector" definitional refinement

The "Military Sector" refers to the armed forces of a given country (Oxford Dictionary, 2013). All civilisations have maintained a military component, from Pharaohs, Emperors to 21st Century Presidents (Dougherty, 2010). Today the Military Sector is global and is relatively consistent in its core armed service elements of: Navy, Army and Air Force; with differing levels of sophistication and development across the globe. The particular aspect of the military considered in this research are the armed forces components; not the civil, administrative, commercial, research and development industrial aspects which support it. Specifically, this research looks at the British Army within the Armed Forces component of the United Kingdom.

2.1.2 The "Energy Sector" definitional refinement

The Energy Sector widely comprises various industries and companies involved in the exploration and development of oil and gas reserves, oil and gas drilling, electrical, coal, nuclear, renewable and integrated power firms (European Environmental Agency, 2000). Like the military, the Energy Sector is consistent across the globe, with the same fundamental nature of energy creation and usage needs; but with differing levels of sophistication and development. For this research, the component of the "Energy Sector" being reviewed is the oil and gas engineering stream, with the focus being on a UK-based global FTSE 100 company.

2.2 Sector Commonalities and Comparability Factors

There are significant commonalities between the military and energy sectors. **Figure 2.2** outlines some of these major commonality factors between the sectors. The commonalities provide a useful platform and justification for comparative analysis; in that, the leadership context is similar in many significant

respects, therefore the role of leadership development, in principle, must also share important commonalities and comparability.



Figure 2.2 - Military-Energy Sector Commonalities. Source: Author

The commonalities identified in **Figure 2.2** are intrinsically linked to strategic and operational leadership contexts of the respective sectors. They are situational contexts in which leaders engage in social interaction with followers (Gentry & Martineau, 2010). Any development of desirable leadership skills and behaviours, inherent in developmental interventions, should be consistent with these contextual factors. The commonalities are outlined in detail in **Appendix B**.

Essentially, these commonalities provide contextual comparability of leadership development needs across the two sectors, and demonstrate the potential for relevance and validity in case cross-sector analysis. Furthermore, supporting these commonalities, specific sectoral leadership challenges are discussed later in this chapter and provide further depth and insight into comparability.

PART TWO – LEADERSHIP

2.3 Leadership and 'Effective' Leadership

Defining "leadership" has proven to be an elusive stipulative exercise (Stogdill, 1974; Bass, 1985; Northouse, 2007). Leadership is categorically analogous with *romance*, in that it involves subjective idiosyncratic value-judgements of what is attractive, and where efficacy is truly measured at its reception. Any description of what leadership is must involve intuition and subjective individualised cognitive processing; like understanding concepts like democracy or peace (Northouse, 2007). This inexorable subjectivity has not perturbed over sixty five different classification systems being developed in an attempt to define the elements or constituents of leadership (Fleishman et al., 1991;

Northouse, 2007). Notable reconciliations of the core theoretic tenets have been synergised in several pivotal publications (Doyle & Smith, 2001; Northouse, 2007; Gill, 2008; Yukl, 2010; Lussier & Achua, 2012).

It should also be noted that as much as ninety eight percent of leadership theories have a distinctly North American character, which stresses individualism ahead of collectivism, and assumes hedonism rather than commitments to duty or altruistic motivation (House & Aditya, 1997; Sveiby, 2009). They also, generally, assume the centrality of work, and the role of rationality rather than asceticism or religious disposition (House & Aditya, 1997).

Proposing a single definition might over-simplify the phenomena, however progress can be made with core aspects of leadership. This sub-section of the chapter will discuss what might be regarded as *effective leadership*, what is good rather than bad, in relation to this research.

Leadership is an anthropocentric phenomenon, wholly concerned with processes of human interaction (Carrol, 2000; Northouse, 2007; Tourish & Pinnington, 2007). Specifically, it is concerned with good behavioural and interpersonal interaction (Bass, 1990; Tourish & Pinnington, 2007; Northouse, 2007). This is how leadership - *good interpersonal relationships* (Tourish & Pinnington, 2007) - differs to management; which is resource-orientated, utilising planning, budgeting, organising, controlling and problem solving, within a formal organisational setting, with designated responsibilities, focusing on achieving goals through people, systems and procedures (Mullins, 1999; Northouse, 2007). The inter-relational processes of leadership are conducted through individual leaders' behaviours and skills, as physical manifestations of innate beliefs and values (Fairhurst & Grant, 2010). Such ideas are codified in theories like transformational leadership (Bass, 1990) and authentic leadership (Kernis, 2003; Avolio & Gardner, 2005). Across these theories, there is an intrinsic emphasis on human- and social-interaction, particularly leader-follower.

Leader-follower interaction might be viewed as a discursive dialectic (Dewan & Myatt, 2008; Fairhurst & Grant, 2010). Hence, leadership might be synonymised with communication between actors (Donelly, Ivancevich & Gibson, 1985; Hargie, Dickson & Tourish, 1999; Flauto, 1999). This conflation was demonstrated by Groysberg and Slind (2012), when they proposed a shift has occurred from traditional top-down communications to a dynamic organisational conversation approach, where dynamic *conversational* processes create greater emotional or mental proximity. This proximity is participative and influential; engendering trust, personalising communication, promoting dialogue and expanding followers' roles and responsibilities. Social interaction with effective structures and processes facilitating leaders' communication are crucial. This view of leadership-at-distance is less

directive and more engaging (Tannenbaum & Schmidt, 1973; Kotter, 1988). It aims to generate de-centralised, systemic leadership across an organisation; where leadership is a social capital as well as a human capital issue (Hosking, 1988).

This view of leadership - less directive and more engaging - was heralded by Kotter's (1988) leadership definition: a "*process of moving a group (or groups) of people in some direction through (mostly) non-coercive means*" (p.16). This shift is consistent with Northouse's (2007) assertion that modern leadership differs from previous incarnations with regards to emerging necessity for follower empowerment and engagement.

The relational, social interaction processes between leaders and followers are correlative and bilateral (Burns, 1978; Hollander, 1978). Grint (1997) found such a notion in Leo Tolstoy's analogy of the boat being situated in the sea and the inter-relationship between the boat (leader) and the waves (followers); describing the movement of the waves ahead of the boat as "*not merely to move of itself but to govern the ship's movement also*" (Tolstoy, 1889. p.34). The key difference being that leaders are more likely to be the initiator of the relationship and its ongoing maintenance, and responsible for establishing communication linkages (Northouse, 2007).

The leader-follower relationship traditionally falls into one of two theoretical categories: *trait*, where leadership is innate, as a set of properties, manifest as genetic talents (Stogdill, 1974; Mann, 1959; Gardner, 1989; Jago, 1982; Kirkpatrick & Locke, 1991; Northouse, 2007); or, a *process*, where context makes leadership available to everyone, and can be learned (Jago, 1982; Bass, 1990; Mumford et al., 2000). These views are incarnations of an old leadership dialectic between Carlyle's (1841) leaders-as-heroes postulation and Spencer's (1896) leadership is intrinsically forged as a product of the times and social context.

For this research the recognition in leadership theory that pivotal interrelationships exist between leader, group dynamics and context in situating appropriate leader-skills and attributes, is important. The important theories representing those dynamics are outlined in **Table 2.1**.

Theory	Key Literature	Theory description
Transformational leadership	*Burns, 1978; Bass, 1985; Bass & Avolio, 1993; Tourish, 2013; Resick et al., 2009; De Haan and Kasozi, 2014; Mills, 2005; De Haan, 2008*	The theory differentiates the functions of transformative leadership (with a focus on follower development) and scrutinous leadership, which focuses on directive leadership - and demonstrates how the needs and expectations of followers are met by distinctly differing leadership approaches. Leaders provide inspirational motivation for followers; intellectually stimulating them to engage in their work and the group context; whilst providing individualised consideration for follower needs and motivators; and generating an idealised influence for followers to aspire towards. These factors are focused on engaging and empowering the followers within the social context for shared improvement. The latter, transactional factors, are about providing followers with contingent rewards for their commitments and delivery against performance expectations; and managing them by exception, whether passively or actively, monitoring their performance through scrutiny and remediation when follower performance deviates from expectations. The theory has attracted some criticism that transformational approaches, specifically elements of it, can produce negative effects. Authors have attempted to mitigate such negative tendencies, by lucidly diagnosing the pressures of the macro environment, and, perhaps most significantly for this research study, advocated applying a relational perspective on leadership and 'leading relationally'. Authors recognised there is a current shift of focus on the leader or follower as a person, towards an awareness that the relationship between leader and follower is the key catalyst for change; change in the sense of appreciating and engaging with patterns of relating. This has been referred to as the 'relational turn' in literature. This relational turn signals a socialisation agenda in leadership research; something this research endeavours to contribute knowledge towards.
Authentic leadership	*Avolio & Gardner, 2005; Tourish & Pinnington, 2007; Kernis, 2003*	This theory unifies two key aspects: the nature of leadership phenomena and leadership development. Authentic leaders lead with purpose, values and integrity; with the systemic view of building enduring organisations, with a long term strategic view and approach to value-generation, and focusing on motivating followers. They do this by holding ever-present leadership development at the heart of effective leadership, through self-awareness and regulation, where positive modelling, unbiased processing and relationship authenticity generate effective leadership behaviours and action.
Emotional Intelligence	*Goleman, 2006; Salovey & Mayer, 1989; Mayer & Salovey, 1993; George, 2000; Goleman, Boyatzis & McKee, 2003;* *Rode et al., 2007*	Leaders' self-awareness and self-regulation is a prominent aspect of Emotional Intelligence. Reflexivity and adaptability are at the centre of effective leadership, and demands an on-going leadership development approach. Leaders must have the ability to be aware of self, in terms of what is effective and negative about their leadership style, and also be able to regulate those strengths and weaknesses depending on their appropriateness: i.e. *is that particular aspect of my personality going to have a positive effect on the social environment?* This requires leaders to be open-minded, honest, and authentic, and open to personal change. Intrinsic to emotional intelligence is understanding and managing the social context. Without a social context, individual leaders would not have a point of reference or arbitration for regulating appropriate behaviours.

Theory	Key Literature	Theory description
Emotional Intelligence (continued)		This interconnectedness has been demonstrated in research looking at the open-loop nature of the brain's limbic system, which showed that the system depends on external sources to manage itself, and that connections we have with other people affects our emotional centre and regulates our moods. Consequently, leaders must have acute awareness of social factors and needs, and what affects they have as individuals on others' emotions and moods, so that they can direct positive emotions, which in generate productive behaviours and energy needed for high performance, over long periods of time.
Leader-Member-Exchange (LMX) Theory	*Dansereau, Graen & Haga, 1975; Graen & Uhl Bien, 1995; Northouse, 2007*	Social interaction factors are also key to Leader-Member exchange (LMX) theory. LMX theory describes a dyadic relationship between the leader and each and every follower; which is seen as a series range of vertical relationships. Essentially the leader must treat each individual differently and build meaningful and effective relationships in a specific, non-generic, fashion. Recent studies in this theory are important for this particular research as within this notion leaders attempt to have high quality inclusive exchanges with all followers, and by using this approach leaders can create and utilise effective networks and partnerships across a whole organisation, at systemic levels, which equally benefits the organisational goals and objectives, the team development as well as leadership development.

Table 2.1 - Key Leadership Theories. Source: Author

An important issue for this research is defining what is meant be 'effective leadership'. This is theoretically problematic, due to large differentiations in key variables and the inflexibility required to create a definition (Fiedler, 1967; Bass, 1990).

Much has been written on 'bad' leadership; whether narcissistic (Kets de Vries & Miller, 1997; Benson, 2006), toxic (Reed, 2004), psychopathic (Furnham, 2010; Gudmundsson & Southey, 2011) or egocentric (Cunningham, 2010) approaches. Such approaches are not entirely destructive and negative, and their allocation as being 'bad' relates to certain effects on follower and social needs. Analysis of these theories reveals a constant that bad leaders' actions are chiefly motivated by egomaniacal needs, values and beliefs; which consequently override community interests of constituents and organisations, and distract leaders from maintaining a social, anthropocentric view of leadership, where the interactions they have with followers are neglectful and dislocated (Kets de Vries & Miller, 1985).

An example of bad leadership which on appearances seems strong and effective, but is actually negative is *toxic leadership* (Reed, 2004; Williams, 2005; Harper, 2014). A formative article on this phenomena comes from the US Army (Reed, 2004). Reed (2004) identifies that toxic military leaders leave groups or organisations in a worse-off condition - it terms of cohesiveness, morale and performance - than when they first engaged with them. However, this may not be apparent to management within the organisation, as toxic leaders often provide their superiors with impressive, articulate presentations and enthusiastic responses to business activity. Even though they are often highly competent and effective in a short-sighted sense, over time they generate inhibiting directive climates, which often have long term team cohesiveness and motivational ramifications, as they are unconcerned or oblivious of staff morale and negative and inhibitive office climates.

Reed (2004) recognised three key consistent elements of a toxic army leader:

- An apparent lack of concern for the well-being of subordinates
- Personality or interpersonal technique that negatively affects organizational climate
- Conviction by subordinates that the leader is motivated primarily by self-interest

These elements generate an impression of the leader, held by the majority of subordinates, as egotistic, arrogant, self-serving, inflexible, and petty. Subsequently, subordinates serving under toxic leaders can easily become disenchanted with the organisation, resulting in lack of motivation and retention issues. The success of these leaders arises in life "over the carcasses of those who work for them" (Reed, 2004. p.68).

Subsequent analysis of toxic and narcissistic leadership within the US Army was provided by Doty and Fenlason (2013) who argued that narcissistic and toxic army leaders "*are selfish and self-serving individuals who crush the morale of subordinates and units. In the best of circumstances, subordinates endure and survive toxic leaders—then the leader or the subordinate moves, changes units, or leaves the military. However, at worst, a toxic leader devastates the espirit de corps, discipline, initiative, drive, and willing service of subordinates and the units they comprise*" (Doty and Fenlason, 2013. p.55).

Reed's (2004) review and, similarly, Doty and Fenlason's (2013) review of toxic military leaders, compellingly suggest that organisations and senior management are most probably oblivious to the ineffectiveness of toxic leadership, and that toxic leaders' behaviour promulgates unhealthy emergent leadership attributes in the organisation, like selfish behaviour, nepotism, rewarding conformity, displaying arrogance and lacking will to succeed and exceed expectations.

These elements generate an impression of the leader, held by the majority of subordinates, as egotistic, arrogant, self-serving, inflexible, and petty (Reed, 2004). It is the leader's unrestrained egoistic agenda, with little regard for social development; which myopically looks to develop-self first and foremost, with little regard for systemic, social and environmental needs.

In the energy sector, similar toxic leadership elements were identified in the BP Gulf of Mexico Deepwater Horizon incident in 2010, where the official report of the US government identified a non-existent culture of leadership responsibility on the oil rig, where leaders wilfully neglected the well-being and safety of the rig crews, in order to achieve their unrealistic efficiency and cost reduction targets. Ineffective leadership was specifically singled out as being a key factor in the fatal disaster (Bartlit, 2011).

Identifying bad or negative leadership phenomena, such as egoistic, narcissistic or toxic, should be actively mitigated in leadership development intervention design. Instead, good leadership phenomena should be targeted.

Drouillard and Kleiner (1996) considered the notion of 'good' leadership, expressing criticisms of current definitions of leadership, viz. that they may, at best, refer to desired effectiveness, but seldom make reference to *goodness*. Indeed, most recognised definitions (Kotter, 1988; Northouse, 2007; Yukl, 2010) omit indications of what is *good* leadership. Drouillard and Kleiner (1996) proposed that goodness might be conceptually assimilated when viewing leadership as influencing others by means of reason and inclusion, in order that organisational imperatives are met which have the long-term best interests of *all* involved, and with the well-being of the community in mind. In this construct, leadership is seen as generating positive impacts on the social environment, through social capital

creation; and measured in terms of positive effects on the environment and humanity (Howard, 2015). Here leadership is a socially-responsible phenomena with constraints on egocentrism and short-term consumptive provocations.

Good leadership is fundamentally about affecting positive improvement through (a) maintaining a systemic view, which links individual leaders' practices with broader, higher organisational needs and practices; (b) focusing on people and improving the quality of team, and social cohesion, through strong values, improved communication and interactions, and social structures and processes; and (c) has a positive influence on the contextual environment that permeates leadership (Drouillard & Kleiner, 1996; Howard, 2015).

Thus, leadership may be seen as having a s*ystemic-anthropocentric-environmental-improvement* (SAEI) focus. For the purposes of this research the acronym "SAEI perspective" will be used as a theoretical working definition for good, and effective leadership. Good leaders within this SAEI construct would chose to confront and grow the collective from adverse experiences, when managers or technocratic leaders might chose to avoid or manipulate the situation to suit personal attainment needs (Drouillard & Kleiner, 1996). Such terms, within the SAEI perspective, demonstrate how Adolf Hitler might be argued as demonstrating effective leadership, but in no sense, was it *good leadership*.

See **Appendix C** for further discussion on a SAEI perspective of leadership.

The above discussion has argued effective leadership should be good, in that it is principally socially responsible, generating positive impacts on people and their interactions; about managing needs, desires and expectations of all actors - not just those of the individual leader. Effective leadership must be contextually-situated, where the focus is on the environmental factors which direct leadership behaviours and interactions. It is about practicing *good* leadership, which is about having a systemic anthropocentric-environmental improvement focus (SAEI), where leaders earn followers' gratitude and the right to lead them (Montgomery, 1961), and consequently, generate shared, social and contextual improvements for all stakeholders.

The literature review will now discuss leadership idiosyncrasies of the respective sector contexts of this research.

2.4 Leadership in Sector Contexts

The following section will review pertinent literature, specifically addressing leadership from the perspective of the sectoral case studies. This will cover reflections on key leadership theories and phenomenon at play in the sectors, synthesised with the literature and research discussed in the

previous section, and includes observations utilising Pettigrew's (1987) triangle of context, content and action in the transformation of the firm. Pettigrew's concept complements leadership theories, which generally address leadership behaviours, by considering the linkages between the content of change, indeed strategic change, and its context and process (Pettigrew, 1987). This approach is valuable in that it treats leadership as a continuous process in context "*where context refers to the antecedent conditions of change, the internal structure, cultural, and political context within which leadership occurs, as well as broad features of the outer context of the firm from which much of the legitimacy for change is derived*" (Pettigrew, 1987. p.650). In this way, leadership behaviours, content, context and process of change are synthesised in the analysis.

2.4.1 Leadership in the Energy Sector

The energy sector has experienced astonishing exponential growth over the last century; breaking expanding frontiers across operational management, technology and geographies; with significant change in both internal and external contextual factors throughout this growth period (Pettigrew, 1987). The sector has been courageous in continuously improving performance of hazardous operations in some of the world's most hostile regions, with exceptionally robust and high-calibre personnel driving this commitment and success. A need to adapt and change; yet build continuity and establish base standards, has typified the sector (Pettigrew, 1987). Without leadership and drive this would not have been possible. Surprisingly, there is very little literature reflecting on leadership within the energy sector.

Organisational leadership in the energy sector is primarily directed towards certain core strategic imperatives. These imperatives are relatively consistent across sector organisations: safety, risk management, productivity and growth. Lord Browne (2004), former Chief Executive Officer of British Petroleum (BP), expounded the link between strategic imperatives and leadership during a 2004 leadership talk:

> "*Our approach to leadership is inevitably shaped by who we are and what we do. Because we are a technologically based company, our model, to be relevant to our people, has to have a rigorous objective-based underpinning*"

This technologically based and objective based underpinning reveals a leadership approach that is technical and process driven; supported by rigorous performance management systems (Kruzner & Trollinger, 1996; Laurens & Van der Molen, 2010; Bertocco & McCreery, 2014; Wilson, 2015). Viewed from this perspective, leadership becomes a mechanistic process, rather than an agency process; where leadership is about achieving organisational objectives, by technological means and supported

by technical knowledge. Such a performance agenda and mechanistic view of leadership, fixated on objective-based management, is understandably consistent across a large part of the wider energy sector (Society of Petroleum Engineers, 2013).

This dominant rationality, enshrining core beliefs, provides the frame of reference for how leaders, and followers, make sense of the changing features of their inner and outer context; i.e. the rapidly changing world around them: operationally, technologically, socially, politically and geographically (Pettigrew, 1987).

This dominant rationality, or focus, has resulted in a form of command and control leadership emerging as the prominent approach, especially in the oil and gas industry[1]. This form of leadership gravitates towards transactional approaches; where active and passive management by exception, along with scrutiny and rigid performance management, predominate. These methods are promulgated by a performance management culture; where an attempt is made to quantify and measure categorically all aspects of operations, supporting the application of a directive and scrutinous leadership approach (Fointama, 2015). Consequently, when objective criteria are met, the performance is satisfactory, but not necessarily more; aspirational visions of exceeding expectations and performing beyond what is expected, are notably uncommon (Fointama, 2015). This leadership style has the potential to generate a fear of mistakes and extreme risk aversion (Cruz et al., 1999; Heifetz et al., 2009). It also places leadership, anthropocentric, skills at a low premium and holds technical knowledge skills as a panacea. Subsequently, management is seen as a hierarchical progression in technocratic competency, rather than a relational or motivational domain. It is not surprising that until relatively recently organisational-wide leadership development initiatives were extremely rare within the sector.

However, this view of management and leadership potentially misapprehends the role of leadership competencies in effective decision making, and assumes that merely superior technical knowledge results in superior decision-making. This is not the case; particularly in the energy sector. The quality of leadership choices has a prime causal relationship with two core imperatives in the energy sector: safety and productivity. Brainard (2011) showed that leadership in the energy sector has a tremendous impact on both these factors at individual and organisational level. The author demonstrated that prioritising the importance of people in an organisation's culture and values has a prominent catalytic effect in generating effective decision-making, which in turn improves the performance across

[1] This issue of "command and control management" was a main address point of the CFO of a major (top 50) Oil and Gas service company at their Annual Tax Conference at Ashdown Park, Surrey in December 2013. He stressed that the 'command and control' leadership style inhibits the company's ability to excel its performance aspirations.

strategic imperatives (Pettigrew, 1987). Specifically, it is core leadership *values* and principles that produce positive mediating causal relationships; where they enhance follower development and engagement and continuous improvement in systems and processes that support safer working environments (Brainard, 2011).

Other research by Zohar (2002) and O'Dea and Flin (2001) support these causality observations by showing that whilst directive leadership approaches predominate in the oil and gas operating environment they actually have a negative effect on leadership, incident frequency and safe practices. If team members feel that directive or autocratic leadership skills disrupts their feelings of well-being or personal safety, the incident frequency increased. Such findings seem paradoxical, in that greater scrutiny and control have traditionally been viewed as the most effective methods of deterring unwanted performance outcomes, when in actual fact, in the oil and gas operating environment, they produce a diminished sense of individual responsibility and engagement in operational activities, leading to increased potentiality for performance failures (O'Dea & Flinn, 2001). Thus it is within the domain of leadership to create *cultures* conducive to team and individual development, built upon leadership values.

Browne (2005) expressed that energy sector leadership must be more than just being capable at your basic job, it must be about leading teams which are multi-disciplinary and multi-cultural, where understanding how to achieve success and get the best out of people varies across different economies, societies and cultures. Culture must be two-pronged; that of the business and also of the operating context. These must be married well in order for the relationship to be complimentary, otherwise they will compete and contradict, generating frictions and mistrust. It is through transformational leadership that such an awareness of contextual and human differentiation can be understood, and then through an open-loop system fed back into leadership behaviours (Barling, Slater & Kelloway, 2000). This behavioural reflexivity requires a high degree of authenticity, emotional intelligence and application of Leader-Member-Exchange theory, across grand spectrums of differentiation.

A 2009 Centre for Creative Leadership study (Hart, et al., 2009) into *leadership challenges in the energy sector* considered what key leadership capabilities were missing and where organisations' should focus leadership development efforts. The study analysed leadership effectiveness data from over 11,000 workers in the energy sector. The authors recognised the sector was going through changing times, and that good leadership was needed, to set new directions, align people with mission-critical imperatives, create commitment to new vision and action, and develop talent (Hart, Pounds, LaShell & Graham, 2009). The study addressed three key issues: (1) "*what leadership competencies are most*

important for energy organisations?" (2) "*How well do energy leaders demonstrate the leadership skills that are required?*" and (3) "*are there differences between energy industry sub-sectors?*" The research findings revealed that the top priorities for leadership development in the energy sector were to *improve the ability to lead employees, handle problem employees* and *lead teams*. Essentially these three issues revolve around social dynamics between leader-follower interactions. That leader reflexivity, emotional intelligence and inspirational motivation were core competencies. Furthermore, organisational leadership must devise career and development strategies to provide significant broad, cross-organisational experiences and learning. Thus, a systemic perspective of leadership competency dispersal. Finally, the study demonstrated that the findings were consistent across the sub-sectors and that sector leadership challenges could be regarded as homogeneous.

These findings, which are explicitly consistent with a SAEI perspective, are mirrored elsewhere in recent energy sector leadership research. Recent reports by Accenture (Hanna, Sloman & Nell, 2011) and Robert Gordon University (Marcella & Rowlands, 2011), point to the need for inspirational and visionary leadership that seeks to exploit collaboration and partnerships, by balancing key stakeholder needs and aligning these for collective advancement and long-term benefit (Marcella & Rowlands, 2011). However, both these reports acknowledge that such leadership is presently deficient across the sector.

A lack of SAEI leadership perspective, notably within the oil and gas industry, is manifest elsewhere in one of the major future challenges: the looming shortage in technically competent personnel. This global challenge is ubiquitously styled the 'Big Crew Change' (Sengupta et al., 2010; Ford Brett, 2011). Essentially, the problem is one of insufficient succession planning, short-sighted leadership and talent management systems, where an over-reliance in utilising an aging pool of talented technical experts, has resulted in considerable skills shortage in the industry. The rigid system of hierarchical progression for technical experts (resulting in static organisational charts), coupled with a highly directive leadership environment, significant outsourcing, and lack of internal capability-building has proved short-sighted. This system has resulted in companies ensuring that the same, highly experienced, aged, personnel being successively utilised in all operations; to the neglect of adequately developing less experienced and industry-new-entry personnel. As the aging 'skilled hands' enter retirement the industry has been left with twenty percent of the industry's personnel with fewer than five years of experience (Ford Brett, 2011). The vital challenge for the industry is to lead, manage and train the successive talent to full-competence in a very short period of time, without the risks inherent in learning on the job, through trial and error. The inherent threats here are necessarily linked to the key industry imperatives: such as, safety and productivity; where a drop in safety might result in loss of

life, and where a dip in performance, of even twenty percent, could cost the industry $35 billion (Ford Brett, 2011).

How the industry generates such high levels of accelerated competency is going to fall to the leadership talents of the respective businesses. New approaches are needed, with a focus on leadership development as a key processual catalyst in systemically engendering new, more effective skills and behaviours (Pettigrew, 1987). These must be SAEI focused and long-term in vision.

This shift in desirable leadership approaches has featured significantly at conferences (Society of Petroleum Engineers, 2013) and in literature (PricewaterhouseCoopers, 2013) demanding more transformational leadership in the sector, moving away from the transactional methods which have predominated. This shift has been witnessed to some extent with the rise of entrepreneurial enterprises and away from a sector hegemony of only a few large operators. Marcus Richards, Chief Executive Officer at Dana Petroleum, stated in a Keynote speech in June 2013 that smaller players, more flexible, agile and entrepreneurial in approach, would be more prominent in future of the industry and that there was a (sic):

> *"…need for a new cadre of leaders. People who can provide a vision and direction for the future. Not only do they need to lead their individual organisations, they also have a critical role to play in improving the reputation and profile of the industry across the world… we've got to be on the front foot, highlighting the significant economic and social benefits."* (Richards, 2013)

These outlined messages are transformational and firmly grounded in a SAEI perspective of leadership.

Thus, an important issue for the development of effective leadership in the energy sector is to understand the reality of the context in which the industry is working, and to what degree it is known or emerging, and to build the right relationships in order to evolve collectively through a process of constant adjustment to ever-changing realities (Browne, 2005; Pettigrew, 1987). Without this context-leadership interaction transfusing leadership development interventions, the sector will struggle to adapt to change and maintain positive influence over its strategic imperatives.

Furthermore, using a contextualist view (Pettigrew, 1987), the energy sector has gone through significant external contextual change during the period of this doctoral research, namely, a sustained drop in commodity price for oil. This may have constraining effects on training and development budgets, and on programme participation, due to counteractions such as restructuring and staffing reductions. It may also have material impact on organisational change content and, therefore, on syllabus content on the leadership development programmes (Pettigrew, 1987). Such changes would be captured in the contextualisation considerations of interventions (Pettigrew, 1987).

The emerging reality of crisis conditions, due to commodity price volatility, has surprised industry. In a 2013 oil and gas industry research paper (Marcella & Rowlands, 2013), both academia and industry leadership were celebrating the upward curve in the industry; which had brought resurgent industry confidence and output; this was premature, as within twelve months the oil price had crashed by %150, leading to dramatic decline in corporate performance and output, and significant re-structuring and redundancies across the industry. The sector was not ready for the crisis.

Commodity price volatility, coupled with other external contextual challenges, such as aging industry workers being replaced by inexperienced newcomers, sensitive environmental controversies and geopolitical strife compounding organisational strategies, increased need for enhanced corporate social responsibility (including addressing transparency and corruption issues, stakeholders rights) and the need to access frontier conventional and unconventional reserves in challenging areas, has meant that the energy sector is potentially faced with radical change requirements, and resultant appropriation of relevant, and perhaps alternative, leadership behaviours.

The external contextual challenges are also met by internal ones, such as sustained commitment to personal safety, particularly through Management of Change processes, environmental safety approaches, and investment safety, by safeguarding equipment through sophisticated maintenance planning and correct operational procedures. Like external challenges these may require changes in leadership behaviours.

Another key internal challenge is the lateral movement of leadership talent across the sector. This movement may pose a significant challenge to generating systemic leadership development, as leaders traverse entirely different teams, social networks, and organisational development needs, undermining contextual consistency and the benefits of nested development.

Despite these significant content and context factors (Pettigrew, 1987), limited change has occurred in organisational leadership across the sector, beyond cutting operating costs and implementing financial and investment constraints. Little radical action has manifested. Perhaps the extant process of convergent incremental change will shift towards a period of strategic reorientation, where the content of change alters, in line with sectoral and macro-economic contextual shifts, and the nature of learning and development interventions readdresses a posteriori constructs and approaches (Pettigrew, 1987).

However, even if a convergent incremental change processual view persists, a change in organisational leadership is possible, as change in the way leaders are managed and developed within organisations

should be viewed as iterative, multilevel processes, with outcomes emerging and evolving over time (Pettigrew, 1987).

Crucially, for change and organisational leadership, core beliefs - codified in corporate values - frame and regulate leaders' sense-making of the expectations of contextual changes and emerging challenges for the organisation (Pettigrew, 1987). Little differentiation may be drawn between the framing and promulgation of core beliefs and cultural development. Indeed, cultural development is a processual factor under Pettigrew (1987) and is a reflection of exerted power, protecting or promulgating the interests of dominant groups; in this case, the organisation. This identification of power as the catalyst is important in understanding how transformational change occurs. Vested interests, of organisations, should be protected (Pettigrew, 1987). In this sense, a systemic leadership development approach, which represents organisational and social development, is quite appropriate and provides the means by which power may be exerted.

2.4.2 Leadership in the Military Sector

There is eminently more extant literature on military leadership than energy sector leadership. Indeed, the military is one of the most common contextual themes for discussing leadership in literature and can be traced throughout history, back to early discourses by Sun Tzu, Tacitus and Machiavelli. A review of the current literature demonstrates wide interpretations of military leadership attributes, some conforming to popular prejudices and others containing more balanced critiques; with a recent trend for more constructive and honest accounts (Showalter, 1988; Ulmer, 1998; Day, 2001; Grint, 2008; Groysberg, Hill & Johnson, 2010).

Showalter (1988) identified that following the Second World War there emerged a dangerous trend in the military of blurring the differences between management and leadership. Heroic warriors and great war-captains were a thing of the past; instead war had become a problem of management. The military establishments were becoming more civilianised. Smith (2002) attempted to impede this paradoxical conflation by stressing that leaders understand war is a human enterprise; whereas managers view war as an application of resources and technology to achieve efficient outcomes. Furthermore, as war is a clash of human wills, which requires willpower to win (Clausewitz, 1832), not merely the efficient technocratic application of resources, one can do everything right in war and still lose. Showalter's negation was challenging the role of leadership and diminishing its functional role and positive effects.

MacIsaac (2000) proposed this trend had reversed since the end of the Cold War in 1989, with contemporaneous deployments in Iraq and Afghanistan, where the emergent human aspect of war is

clearly evident (Stewart, et al., 2004a; Febbraro, et al., 2008), and in recent years, there has been increasing demands on developing leadership competencies and a revived commitment to clearly differentiate it from management (Plante, 1998; Ulmer, 1998; Livingstone, et al., 2002; Febbraro, et al., 2008).

Nonetheless, literary critiques of military leadership have identified specific short-comings across issues like military leaders' maintenance of ethical behaviour, particularly when faced with subtle forms of ethical relativism, which blur whether issues are deemed right or wrong; or exaggerated loyalty syndrome, where leaders are afraid to tell, or receive, the truth; or an obsessive drive for success in which ethical sensitivity is repudiated because of a personal need to achieve (Johnson, 1974). Admittedly, such issues are universal challenges for all leaders, irrespective of sector; however, acknowledgment is made that the military is not immune (Johnson, 1974; Reed, 2004).

As discussed earlier in Part Two of this chapter, toxic and narcissistic leadership within the US military have been identified as being specific challenges for military leaders (Reed, 2004). There is relative consistency across the literature covering this criticism (Reed, 2004; Doty & Fenlason, 2013) and tends to refer to problems rooted in organisational leadership in operational environments, antiquated HR systems, like career selection, evaluation and promotion systems; and top heavy management structures. These latter observations repeated by Tim Kane in his 2012 book *Bleeding Talent* describe systemic talent mismanagement and lack of honesty in performance evaluations as being the reason the US military fails to retain its best talented leaders. However, it must be noted that no observations or linkages are made in the literature to military training environments. It is also important to recognise that the aforementioned authors on military toxic leadership almost entirely refer to senior leaders in their critical analysis: Colonel, Battalion Commander, Brigade Commander (Doty & Fenlason, 2013); and, Company Commander (Reed, 2004). All of these leadership positions are senior to the mid-level leaders participating in the military case study in this research, and may be symptomatic of different sorts of senior leadership challenges in the military.

In the United Kingdom, Whitehall investigations into circumstances surrounding the deaths of four soldiers at Deepcut army barracks between 1995 and 2002, concluded that a toxic environment pervaded the barracks, with those in positions of responsibility abusing their power (Blake, 2006). Systemic abuses were reported, with dozens more allegations of abuses - including that a senior officer indecently assaulted a female trainee - unreported as complaint processes were vague and senior leadership unapproachable. The investigations reveal strikingly, in this instance, that the army did not have adequate structures in place, nor the appropriate leadership culture and behaviours, to provide proper duty of care (Blake, 2006). In 1997, the US Army had a similar case of institutionalised abuse of

authority at Aberdeen Proving Ground, Maryland, with the resultant dramatic negative effect on follower confidence in organisational leadership (Ulmer, 1998). Such, tragic and fatal, examples of bad leadership, which essentially fails to focus on improvements and positive impacts on social and environmental factors, not just egocentric delectation and narcissistic power abuses, underscores the need to promote and develop SAEI orientated leadership through leadership development initiatives.

Despite the above criticisms, considerable literature outlines the core efficacious attributes of military leadership doctrine and practice.

Military leadership requires aptitudes in collaborative working with multi-national partners, whilst maintaining the highest levels of operational safety and respect for human life, and exploiting technological advancements and advantages (Finnish Ministry of Defence, 2006; Febbraro, et al., 2008; Royal United Services Institute, 2010; UK Ministry of Defence, 2011; Klein, 2011; Norwegian Ministry of Defence, 2012; US Department of Defence, 2012). These imperatives create an operational context for leadership which requires high degrees of leader reflexivity, cultural awareness, delegated decision-making to low levels, impeccable values and standards and a competency for adopting new and emerging technologies (Livingstone, et al., 2002; Febbraro, et al., 2008). Military leadership has been forced to evolve competencies during a modern period of immersion in wicked problems (Grint, 2005).

For example, the role of mid-level military leaders in Afghanistan have been described as essentially being the 'mayor of the town' (Klein, 2011), interacting with the local council of tribal elders, requiring skills and competencies in complex team building and situational adaptability, and interacting with the wider local community about future developments (Febbraro, et al., 2008). It is through developing effective collaborations and having positive influence that leaders can succeed; with cultural awareness, emotional intelligence and leader reflexivity being key leadership attributes. These characteristics must be transformational in nature (Febbraro, et al., 2008) and involve a strong sense of purpose, innovative thinking, individualised concerns, shared goal-accomplishment, negotiation and compromise, coaching and mentoring, and inspirational motivation (Champagne, 1999; MacIsaac, 2000; Febbraro, et al., 2008). Indeed, the term 'mayor of the town' might represent a suitable sobriquet for SAEI perspective leadership.

The multi-national aspect of military collaboration requires leaders to master the ability to transition from one leadership style to another, and change depending on the situational context (Febbraro, et al., 2008). This requires authentic leadership theoretic competencies, within the transformational

schema, and acute behavioural reflexivity, indicative of emotional intelligence (Champagne, 1999; Knell, 2002; Livingstone, et al., 2002; Stewart, et al., 2004b; Febbraro, et al., 2008).

An internal review of British Army leadership by Knell (2002), which involved profiling one hundred mid-level army leaders, demonstrated that emotional intelligence was a fundamental theoretical foundation for conceptualising military leadership. This supported extraneous literature which recognised emotional intelligence in military leadership as an important facilitator for that conceptual promulgation (Livingstone, et al., 2002; Zugek & Korabik, 2004).

Employing agile emotional intelligence helps military leaders cope with social complexity and the multiplicities and diversities inherent in social dynamics and interconnectedness. It is the application of emotional regulation and management in a social context that is most essential for multi-national collaborations and global operations (Champagne, 1999; Zaccaro, 2002). This social emotional intelligence allows leader-social awareness and acumen to efficaciously augment into the most appropriate response selection and enactment (Zaccaro, 2002); which in turn supports essential situational competencies like conflict management and persuasiveness (Zaccaro, 1999).

Military leadership makes definitional reference to the application of either formal authority or the projection of personal attributes or character to get others to do what is required of them (Wenek, 2005). This codicil expresses both the formal hierarchical structure typically associated with military leadership – broadly recognised as "command and control" – and leaders' implicit responsibility to develop strength of character and inspirational motivation. All military commanders are inherently leaders in the former, formal sense; but all commanders must earn, or develop, the latter informal sense of motivational leadership (Weber, 1947; Knell, 2002).

In the military, command comes under two categories: *Befehlstaktik* and *Auftragstaktik (*Storr, 2007*). Befehlstaktik* is an autocratic extrapolation of command, conveyed through formalised and inflexible orders, with absolute expectations of delivery against explicit terms. Whereas, *Auftragstaktik* is participative command; where recipients receive broad objectives and desired end-state, but are empowered with initiative to construct operational solutions. In western militaries, this is referred to as 'Mission Command' (Storr, 2007). *Mission command* is a three part schema, consisting of responsibility, higher intent and a contract of trust (Storr, 2007). This involves leaders generating an understanding for the wider context and how they wish to positively affect or influence the operational environment. It facilitates subordinate leaders' freedom of actions, generating latitude, as a product of trust, empowerment and initiative-taking, and accelerates productivity and tempo (Storr, 2007).

Mission command is an effective approach to command because it generates self-synchronisation between individual leaders and organisational imperatives and leadership ethos (Storr, 2003). It empowers and engages with leaders to consider organisational intentions, and promotes solutions-based thinking and creativity in the selection of future possible actions, even when the desired outcome contains gross uncertainties (Rittel & Webber, 1973; Van Creveld, 1989; Grint, 2005, 2010; Ritchey, 2007). Through this, it engenders a sense of systemic leadership responsibility at all levels of organisational leadership.

The informal element of military leadership, leaders' implicit responsibility to develop strength of character and inspirational motivation, is found in another key construct in the UK military: Adair's (1997a; also see Forsyth, 2006) *action-centred* leadership taxonomy. These inter-relating parts and functions are show below in **Figure 2.3**. This three-part taxonomy is systemically applied across military leadership. The model allows military leaders to see leadership in terms of a process that balances individual and group needs, and what has to be accomplished. The role of a leader in this model demands an active movement by the leader through matching varying *expectations* of the three parts, and through balancing these issues practices effective leadership, consist with a SAEI perspective.

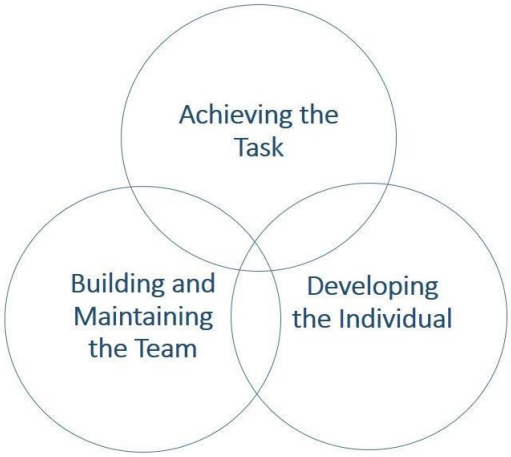

Figure 2.3 - Action-centered Leadership. Source: Adair (1997b)

Military leadership shows evidence of being distinctly systemic, particularly through collective unity of effort and strategic alignments. These two observations were clearly expressed in a 2011 interview with General Sir Rob Fry:

> *"The military only succeeds by emphasising the collective output rather than concentrating on individual output. There's more of a sense of how the aggregate performs [than in business]. Business can really benefit from learning an unbroken narrative between strategic intent at the top of an organisation and tactical application at the bottom from the military. Having*

> *been given a mission, managers derive collective responsibility and then translate that into individual responsibility and pass the process right the way through an organisation so everyone can work out what their contribution to overall success would look like."* (Fry, 2011)

These factors allow military leadership to generate strategic organisational development 'golden threads', with unbroken narratives between strategic intent and operational leadership. This promulgates a broader understanding of corporate missions beyond just the executive. In the military, all leaders across the organisation from the bottom to the top engage in a self-conscious process of sense-making, with regards to strategic purpose and social alignments. The military approach to systemic leadership is more engaged and empowered, as it conveys consistent and transparent intents, yet allows flexibility around objective-setting and task activities. The catalyst for this promulgation is *mission command*.

Supporting this is a commitment to have highly developed leadership quotient across the whole organisation. This is necessary for consistent systemic cognitive processing of language, expectations and decision-making. This observation is supported by large-scale systematic leadership development from Corporals to Generals: top to bottom. All managers receive leadership development, constructed around core consistencies, including, most importantly, institutional values and standards (British Army, 2008).

Values are seen as *the* fundamental essence of military leadership (British Army, 2008). This centrality of importance is consistent with authentic leadership development, where values and leadership catalyse the personal and social identification processes of followers, whereby they come to identify idealised and necessary behaviours with the demonstrations of leaders and their values (Avolio & Gardner, 2005). The values of British Army leadership are viewed as the life-blood sustaining the organisation. It facilitates unequivocal organisational commitment. They are seen as active verbs; penetrating every command and leadership decision, instinctively (British Army, 2008). A former Chief of the General Staff of the British Army describes this as:

> *"The Values are about character and spirit: the Standards define our actions and behaviour: I expect everyone in the Army to abide by these Values and Standards."* (British Army, 2008)

The values are systemic components of the British Army, taught at all levels: from initial phase-one basic training to advanced senior officer leadership development programmes (Ministry of Defence, 2014). These values are regarded as moral principles, grounded in intangible character and spirit. They been described as being the personality of the service; generating a strong reputation and identity (Watters, 2011). The values are not mechanically inherent in the system and are only instilled by a

robust and clearly articulated and integrated values framework. It is the function of leadership, at all levels, to implicitly understand and live by them. This represents a systemic commitment to transformational leadership. They must become the default-setting of leaders regardless of upbringing, personal values, beliefs and ambitions (British Army, 2008).

For Pettigrew (1987), the corporate values of an organisation are vital for maintaining a contextualist view, as they frame leaders' sense-making of contextual changes and emerging challenges. Indeed, Pettigrew (1987) proposes the framing and promulgation of corporate values *is* cultural development in organisations.

The emphasis of values in military leadership has been widely recognised in the civilian world. This was captured in a Time article (Klein, 2011) in a statement about a military veteran running for political office in the US: "*I'd work for any veterans running for office because I know their values*" (p.27). This judgment was based on a recognition that value-based behaviours are a key component of military leadership: "*in the military, it's never about you, it's always about something larger*" (p.27). This affinity to moral, socially responsible values is based on the presupposition that a military unit rises and falls together; essentially, regarding as its antithesis the emerging societal trends of entitlement culture and lack of individual accountability (Klein, 2011). One Yale University neurology academic stated it further as "*I'd love to see the values and ethics of the military spread into the general population*" (Klein, 2011. p.29). In military values the interests of the team supersede the interests of individuals (British Army, 2008). Social maintenance is held in higher regard than individual. This reflects a SAEI perspective.

It is precisely because military leadership is situated primarily in contextual and group needs that it has a social capital development orientation. Leadership is regarded as a service of others and organisational-support mechanism. It upholds and represents collective service needs. This point is elucidated in the motto of the premier leadership development establishment in the British Army, the Royal Military Academy Sandhurst: "Serve to Lead". In this view, leadership is less about the needs of the individual leader and more about those of followers and the environment. Military leadership authority John Adair (1997a) described it as "*leadership is essentially an other-centred activity - not a self-centred one*" (p.18).

Military leadership in this view is consistent with a SAEI perspective. They focus on collective effort, behavioural consistency and strategic alignments; for all stakeholder parties. Strategic leadership quotient exists across all levels of the organisation, with common language and conceptual understanding of core functions of leadership, such as mission command and action-centred

leadership. Meaning leadership is collective, consistent and aligned; thus, systemic. This alignment is promulgated by strong value-based behaviours, where leaders are charged with personifying values, whilst maintaining focus on operational effectiveness and morale, by confronting behaviours and sustaining the collective through adverse experiences (Drouillard & Kleiner, 1996). These desired attributes are entirely consistent with the SAEI perspective of effective leadership.

Lastly, considering military leadership, and its development, within the context of organisational change, it sits distinctly, from a processual perspective (Pettigrew, 1987), within a long convergent period of incremental change, with relative consistency in organisational strategic imperatives across large periods of time. This consistency is correspondingly reflected in the content, processes and people engaged in delivering and participating in leadership development, and also in the process of participants commencing and remaining with the army either side of the programme.

Although retention might potentially vary dependant on external contextual factors, such as employment ratings in society, the British Army has typically not been affected by wider societal factors when it comes to recruitment and employment of leaders. However, in 2015, media outlets such as UK's Daily Mail[2], reported a shortfall in posts filled on its principal mid-level leadership programme, resulting in its first recruitment campaign in over a decade. It was suggested the drop-off reflected a steady fall in graduate recruitment into the Armed Services as a whole. How much of this is linked to a deterioration in the perception of military service, following negative UK media reporting, through issues such as Deepcut and Chilcot inquiries, is unclear.

With regards to instigating any change to developmental content within military leadership development, as a reflection of changes in strategic landscape, this proceeds from high level management (Pettigrew, 1987). Indeed, management of leadership development programmes are represented by the highest levels of rank seniority in the army, and represents the degree to which change is a top down process. Furthermore, Pettigrew (1987) proposed that top level change processes potentially catalyse through the encouragement of destructive and constructive processes of organisational learning. This proposition is particularly appropriate for the military and is discussed later in detail in the 'Performance' thematic analysis (section 4.7.3) and encapsulated in the proposed theoretical solution '*Challenge Pascal's Problem'* in Chapter Five. The encouragement of destructive and constructive processes of learning are essential to participants' performance feedback on leadership development programmes, and are supported by trainers and programme managers who

[2] http://www.dailymail.co.uk/news/article-3257085/British-Army-launching-recruitment-drive-new-officers-decade-Sandhurst-sees-fall-numbers-picking-military-career.html (Extracted 5th December 2015)

have exertive power, in order to protect and promulgate the interests of the dominant group (the organisation) in the learning environment (Pettigrew, 1987).

Applying Pettigrew (1987), change in military organisational leadership does not occur by dramatic ideological revolutions, rather, as stated, by continuous incremental processes of change. This may differentiate it from the energy sector, which may require an ideological revolution, reflected in a paradigm shift of core beliefs and corporate values, and their application.

The need to remediate ideological inconsistencies in energy sector organisational leadership, evident later in Case Study A and Validation Study analyses, is potentially vital for generating systemic leadership development. Pettigrew (1987) states:

> "*This is because ideological inconsistencies increase uncertainty and make it difficult to marshal the strong commitments and high levels of motivation and energy which are necessary to create radical organizational changes*." (p.664)

The adaptive potential for energy sector organisational leadership to deal with radical organisational change is locked in extant culture, and the core beliefs held by the leadership, codified in corporate values. Pettigrew (1987) proposed that real change requires crisis conditions; where the circumstances of the crisis provides sufficient leverage to break through inertia and affect organisational change. The energy sector has such a crisis with the oil price crash and the subsequent strategic shifts in resourcing. The military has not experiencing such crisis conditions and therefore potentially lacks leverage, or necessity, to conduct radical change, with its correlative shift in corporate beliefs and culture. However, such crisis conditions may shortly emerge for the UK military as it implements a future strategy aimed at significantly downsizing military personnel numbers and relocating strategic bases and locations.

The literature review will now progress to critically reviewing relevant Leadership Development literature.

PART THREE – LEADERSHIP DEVELOPMENT

2.5 Leadership Development

There are two schools of thought that affect this question: (1) leaders are either born and their qualities are subconsciously embodied (Carlyle, 1841; Nietzsche, 1969); or (2) humans must develop respective qualities before they can emerge as leaders (Henrikson, 2006; Mostovicz, Kakabadse & Kakabadse, 2009). This research espouses the second view, the developmental school of thought, and believes that we should endeavour to understand the conscious steps that might be taken to become

a better leader (Kakabadse & Myers, 1996; Mostovicz, Kakabadse & Kakabadse, 2009). Borne of existential phenomenology, this position holds that there exists a deliberate and constant state of becoming and intentionality of development (Mostovicz, Kakabadse & Kakabadse, 2009).

Leadership development has customarily been regarded as an individual-level skill development (Day, 2001; Bolden, 2005), through training intrapersonal and interpersonal skills and behaviours (Barling et al., 2000). However, this perspective tends to dissociate the practice of leadership from the organisational and situational contexts (Bolden, 2005). This led to an additional term of *leader development* to refer to this specific individual-level of development (Day, 2001). Day (2011) draws a distinction between the two approaches, with *leader development* focused on building individual capabilities; whereas *leadership development* refers to the macro, systemic applications of developmental interventions, concerned with teambuilding and organisational development. There are naturally significant overlaps in the approaches, and like the analogy of a fleet of ships, unless an individual ship is in working order, fully-equipped and consistent with the grander mission of the remainder of the fleet, the fleet cannot achieve its purpose; however, the fleet needs a purpose, alignments and direction to avoiding ships bashing into one another. Factors and functions of developmental interventions will inevitably overlap across the two approaches. However, the purpose of the current research thesis is to consider the wider, systemic application of *leadership development* at the organisational level. This dissection of the definition of leadership development is pivotal to this thesis, and is discussed in greater detail in Part Four of this chapter.

As this research is concerned with the more complex social interaction between individuals and the organisational environment within which they lead (Fielder, 1967; Day, 2001), our view is less concerned with the development of certain leadership qualities in a number of individuals, rather, that leadership development should be focusing on underlying processes that give rise to improved organisational effectiveness (Bolden, 2005). This is consistent with the modern view of leadership, that it is understood as being collaborative; a collective capacity of all members within an organisation, with the intention of setting overall direction, motivation and purpose, aligned across all levels, and ensuring buy-in from all actors (Kotter, 1990; Heifetz & Laurie, 1997; Hernez-Broome & Hughes, 2004; McGonagill & Pruyn, 2010).

Thus, leadership development should be focused on developing collective capacity within an organisation (McCauley et al., 2010; McGonagill & Pruyn, 2010), often towards building adaptability across groups of people in anticipation of unforeseen and complex challenges (Day, 2001); with a sustained focus and connectivity to broader organisational strategic imperatives (Hall & Seibert, 1992;

Day, 2001). It is about developing the capacity for leadership within organisations and systems, which is orientated towards the collective (McGonagill & Pruyn, 2010).

2.6 Differentiating Leadership Development and Management Development

A definitional boundary must be identified between leadership and management development, as to avoid ambiguity and potential over-lapping. Several commonalities and feedback exists, such as within a functionalist perspective (Finch-Lees et al., 2005; Mabey & Finch-Lees, 2007), but it would be misleading to assume homogenisation ontologically and epistemologically. Management generally relies on predictable and quantifiable applications of processes, and is generally located in a Realist or Positivist domain (Ritchie, 2010). In that sense, the nature of phenomena differs, and as such, observability and causality differs. Treating them as differentiated concepts, management development should be regarded as the process by which individuals improve 'management' capabilities and learn to perform more effectively in managerial roles (Baldwin & Padgett, 1993; Mumford, 1997). This involves applying the right training to a formal title-holding group of people with the development of necessary rational competences and skills to carry out particular processes, like financial and operations management methods (Mabey & Finch-Lees, 2007), and enhance task performance, by which those activities are defined, resourced, controlled and evaluated (Winterton & Winterton, 1997; Mullins, 1999; Day, 2001; Mumford & Gold, 2004; Northouse, 2007). Broadly stated, management developmental interventions should be orientated towards improving resource management capability, as opposed to people management capability; systems- opposed to social-factors. Management development primarily focuses on performance in formal managerial roles, whereas leadership development focuses on application when the actor has both formal and informal authority (Keys & Wolfe, 1988; Day, 2001). The majority of research defines management development in instrumental terms, targeting accounting and economics professionals, and focuses predominantly on improved tech-centric performance; with perhaps an unhealthy 'ends-means' over-simplification (Mabey & Finch-Lees, 2007). Such an oversimplification was evident in the energy sector literature review. Therefore, a differentiation can be made with regards to tech-centric and competency-based management development; and, people-social-centric and improved human interaction leadership development.

2.7 Leadership Development in Practice and Research

It has been proposed that effective leadership is a key performance differentiator or determinant of organisational effectiveness and success (Hernez-Broome & Hughes, 2004; Chartered Institute of Personnel & Development, 2005; Tourish & Pinnington, 2007); with leaders potentially affecting

business performance perhaps by as much as 10 percent in annual earnings either way (Grint, 1997). Notable studies have demonstrated linkages between leadership capacity and competitive advantage (Wellins & Weaver, 2003); with as much as 20 percent of competitive advantage gained through effective leadership (Chartered Institute of Personnel & Development, 2005). This realisation that leadership might be a silver bullet has resulted in greater emphasis being placed on leadership development (Hernez-Broome & Hughes, 2004). Indeed, the international market for leadership development ranges from $15-50 billion (Fulmer & Goldsmith, 2001; Merritt, 2003; Reade & Thomas, 2004; Rockwood Leadership Institute, 2006; Tourish & Pinnington, 2007; Lamoureux, 2007).

However, despite the precept that organisations should develop their leaders (Leskiw & Singh, 2007), research suggests less than half of organisations have formalised processes to do so (Gibert et al, 2000). Equally, there are concerns that organisations are squandering their investments by failing to implement effective interventions or evaluate participant and organisational developments. Tourish and Pinnington (2007) identified that as much as 80 percent of organisations conducting leadership development interventions are unable to identify any effect on their organisation; and, two-thirds of US multi-national companies surveyed felt their programmes were ineffective in building the required leadership capability (Molinaro & Weiss, 2003). Lamentably, leadership development is one of the least explored areas within leadership research (Avolio, 2007; Day, Harrison & Halpin, 2009; Avolio et al., 2010; Mabey, 2013), with both systematic reviews of interventions and theories being notably absent (Avolio et al., 2010). This is most evident in the scarcity of published research (Day et al., 2009). Subsequently, scrutinising the efficacy of leadership development interventions has emerged as a top priority for the advancement of systematic and repeatable best practises (Conger, 1992; Cacioppe, 1998; Day, 2001; Avolio, 2007; Rousseau, Manning & Denyer, 2008; Howard and Wellins, 2008; Day et al., 2009; Avolio et al., 2010; Day, 2011; Mabey, 2013). Also, more tying together of extant theory and practice, in order that organisations can actualise more effective leadership development (Day & O'Connor, 2003; Day et al., 2004; Avolio, 2005; Rousseau, Manning & Denyer, 2008; Day et al., 2009; Mostovicz, Kakabadse & Kakabadse, 2009; Jones, 2011; Dinh et al., 2014).

An important observation for leadership development is that leadership is not primarily grown on programmes, but occurs extraneous to development initiatives (Day et al., 2009; Day, 2011). This notion is contrary to widely held misconceptions and assumptions within business education (Dexter & Prince, 2007). Research is gradually unpicking potential shortcomings, for example, with suggestions that business schools are not delivering research and development programmes in line with real business needs, and that interventions are too theoretical, abstract and irrelevant to actual managers issues (Advanced Institute of Management, 2006). Cunningham, Dawes & Bennett (2004) identified

poor real-life applicability linkages with classroom-structured interventions. Consequently, the correlativity of developmental learning aims and content with specifiable workplace applicability has emerged as a vital issue within leadership development (Thackwray, 1997; Dexter & Prince, 2007). Any developmental approach failing to capture this key design functionality is likely to fall short in generating credible, evaluative progress in participant development (Dexter & Prince, 2007). McCall, Lombardo and Eichinger (1996) suggested a 70:20:10 ratio might be indicative of how leaders learn. Their research revealed that 70 percent of learning comes from challenging assignments and on-the job experiences; 20 percent of learning was developed from relationships with other people, networks and feedback; and, 10 percent of learning was derived from formal training, such as courses and workshops. Leadership development must consider exploiting 70:20 aspects of the ration, more than merely classroom interventions.

A key issue in leadership development is the complexity around how leaders develop. Adair (1997a) observed leaders cannot be taught, rather there occurs a moment of *spark*, where their experiences come into contact with new relevant and appropriate ideas, resulting in a moment of cognition where learning occurs. This idea was endorsed by Avolio (2005) who proposed little evidence points to leaders being developed by interventions. However, both researchers fail to recognize the complementary functions of multiple pedagogical methods, such as action learning, problem-based and enquiry-based interventions (Dexter & Prince, 2007). Equally, the research looked to measure impact at individual leader level, rather than at systemic organisational level.

Nevertheless, Avolio (2005) proposes that *individual developmental readiness* is a vital factor in efficacy of leadership development interventions. Avolio's Life Stream model (2005) considers this within the holistic context of one's life experiences and how one deals with experiences. The Life Stream model is an abstract concept for defining accumulative events and their contribution to one's view of the world. An individual's ability to learn from events is dependent on factors, such as adjustability of individual perspective and beliefs, internal model (i.e. domestic and social experiences; up to impact of national events) and balance between individual life model with collective level. Personal reflection is a vital component of this ability to learn from events (Brookfield, 1995; Day, 2001; Densten & Grey, 2001; Day & O'Connor, 2003; Avolio, 2005). Thus, leadership development is indelibly linked to whole life development; a constant state of becoming (Avolio, 2005); similar to Field Marshal Slim's (1957) axiom that Leadership (sic) 'is just plain you'. Indeed, becoming an effective leader takes time and formative experiences. In fact, to achieve expert status, research has indicated that developmental time may be approximately ten years or ten thousand hours (Ericsson, krampe & Tech-

Romer, 1993). Day (2011) indicated this figure would be equally appropriate within leadership development applications.

As mentioned, leadership development should not merely be defined as focusing on behaviours and skills of leaders, but on results of relationships within the corporate environment (Hernez-Broome & Hughes, 2004) - relationships that focus on interactions of both leaders and collaborators instead of merely on leaders' competencies. Organisations that develop the appropriate structures, culture and strategic prioritisation in regards to implementing leadership development programmes are observed to be better prepared for future challenges (Miller, 1991; Fulmer, 1997; Leskiw & Singh, 2007).

Day (2001) added a further perspective, in that it is not necessarily 'best practice' that leads to successful leadership development; but, rather a systematic and *consistent* implementation of extant interventions. Consistent in terms of content, design, attendance, outputs and multiple levels. Avolio (2005) supported this observation that effective leadership development is replete with repetition. In order to achieve this, organisations must commit to leadership development as a systemic process, not a singular or short term event (Hernez-Broome & Hughes, 2004). Systemic leadership development is a much more complex endeavour, which requires synchronisation across many departments, tiers, organisational development needs, and contextual environments. For these reasons, there are pleas to empirically address linkages between leadership development and organisational performance (Collins and Holton, 2004), and a general shift in leadership research towards social network and social identity theories of leadership, and systemic perspectives of leadership theories (Dinh et al., 2014).

Thus, this research attempts to contribute meaningful conceptual and empirical insight to the debate of what constitutes effective leadership development interventions, particularly those that have meaningful impact on systemic development.

2.8 Cardinal Themes in Leadership Development Interventions

In order to progress with critically evaluating leadership development, this research sought to identify core themes that traverse across all developmental interventions, build upon extant literature, and target analysis towards key thematic factors. Several consistent cardinal factors were identified and assessed as having significant influence on the efficaciousness of developmental interventions.

The cardinal themes that emerged from the literature review were:

1. *Delivery*: that appropriate design and delivery were essential aspects of efficacious leadership development interventions.

2. *Contextualisation*: developmental interventions must recognise that effective leadership practice is fundamentally dependent on contextual differentiation.
3. *Performance*: that participant performance is a key factor in intervention efficacy, and that feedback has a pivotal developmental function.
4. *Impact*: the impact of developmental interventions must be of a sufficient degree in order that meaningful change is generated.
5. *Values Integration*: that desired collective values must be incorporated into leadership development. These values forge culture and subsequent behavioural norms.

In addition to the above themes, the review revealed an additional factor, though extrinsic to leadership development programmes and as such should be treated separately, but which must be taken into account, was the nature of *organisational leadership* (Zaccaro & Klimoski, 2001; Zaccaro, 2002; Schein, 2010; Probert, 2011). As social intelligence represents a key aspect in systemic leadership development, with linkages to social capital and socially-constructed notions of leadership, it is vital that higher levels in the organisational hierarchy demonstrate efficacious social reasoning and relational competencies. Organisational leadership has the potential to entirely set both effective and ineffective dynamic social domains as schemata organisations have set in their culture (Probert, 2011). As such, this research should consider the wider organisational leadership context, outside of the developmental interventions, and to distinguish what organisational leadership should look like, given extant situational factors. Furthermore, generating this additional perspective will allow for the development of organisation-specific programmes, which directly relate to contingent organisational leadership issues, such as change drivers, team dynamics and collective shifts in culture and behaviours (McGonagill & Pruyn, 2010).

The cardinal themes are now discussed in greater detail.

2.8.1 Delivery

Leadership development programmes can be delivered as open or custom. Open programmes are delivered by private organisations, such as universities. Custom programmes are often designed and delivered in-house (Day, 2001), though more in conjunction with partners, such as a university or consultancy (Benington & Hartley, 2009). Custom programmes have strength in their specificity to individual business needs, control over content and delivery, and are seen as unique investments (Day, 2001).

A key paradox for leadership development delivery is the observation that programme quality has decreased and is seen as being poorly executed, despite huge financial investments and breadth of developmental methods (Tourish & Pinnington, 2007; Howard & Wellins, 2008). Day (2011) identified poor delivery as being a fundamental stumbling block to making meaningful progress in the domain.

Coupled with other important factors, like design and implementation of interventions, is the issue of appropriateness and selection of leadership trainers. Adair (1996) described training leaders a more difficult task than selecting them. Indeed, many organisations obtain leadership development products from consultancies, which are intrinsically disconnected to business needs and not adequately engaged by senior management, therefore making it harder for the interventions to have any meaningful systemic effect on corporate culture or multi-levels (Ready & Conger, 2003).

Indeed, the abilities of the training personnel to deliver upon agreed developmental outcomes against the business objectives is a key concern, and must be evaluated and assessed frequently in order that desired competencies emerge from the developmental interventions (Leskiw & Singh, 2007; Tourish & Pinnington, 2007).

It is thus surprising a dearth of research literature exists on the selection criteria and appropriateness of leadership developmental trainers or facilitators. Certainly, inappropriate trainers or facilitators can account for poor contextual linkages and integration of real-life issues within developments, and research suggests that poor facilitation can lead to an inability to generate rigorous reflection on the experience of leadership in practise (Bennington & Hartley, 2009).

In his 1968 publication *Training for Leadership*, John Adair states that the:

> "*ideal (leadership) instructor should possess natural ability and experience as a leader in his own sphere, a working knowledge of the general theory of leadership at a greater depth and width than the level on which he is expected to teach, and reasonable skill in a variety of educational methods*" (p.6)

This definition is still appropriate, as organisations are recognising the importance of situational leadership quotient in the delivery of developmental interventions. This requirement was stated elsewhere by Bob Quick, Assistant Commissioner Specialist Operations at the Metropolitan Police Service as:

> *"we must recognise the importance of having highly credible, capable people with a proven track record of success in the service, moving for some period of their career into a leadership training role"* (National Policing Improvement Agency, 2008. p.15)

Indeed, more frequently CEOs and their executive team members contribute to leadership development (Hernez-Broome & Hughes, 2004). Popper (2005) stated that organisations have reported leaders achieving significant learning through the observation of direct managers in developmental programmes.

Other research has demonstrated that the interaction of leaders within an organisation in delivering aspects of leadership development programmes has a mediating success relationship in effective interventions (Vicere & Fulmer, 1998; Adair, 2006), and improves direction and influence in terms of aligning and communicating goals, policies and professional development and setting the 'leadership tone' for an organisation (Leithwood, 2007). Further research by Foster, Angus & Rahinel (2008) has pointed at learning theory to support the better delivery of leadership training, which looks at social constructivist and behavioural factors in learning experiences and how to better apply learning principles, such as activating prior knowledge or generating opportunities for social interaction and thereby for the co-construction of new knowledge and understanding.

Another fundamental issue within delivery of leadership development interventions is how they are designed and constructed. Research by Howard and Wellins (2008) has identified, amongst other observations, that leaders have become ever more dissatisfied with the design of leadership development programmes, and that the quality of programmes has diminished. An essential factor in mitigating the intrinsic failure of these observations is contained within the initial processes of how organisations construct their initiatives.

Construction, or the design and implementation, of leadership development programmes has been discussed in pertinent literature (Cacioppe, 1998; Fulmer & Wagner, 1999; Ready & Conger, 2003; Weiss & Molinaro, 2006; Leskiw & Singh, 2007; Tourish & Pinnington, 2007; Bailey & Clarke, 2008), with some of the key construction issues emerging around the appropriateness, capabilities and influence of human resource and learning and development managers to positively affect or understand the business strategically (Bailey & Clarke, 2008; Guest & King, 2004); over-reliance on competency frameworks (Conger & Xin, 2000); and the insufficient evaluation of development and business value outcomes (Mabey & Thomson, 2000; Bailey & Clarke, 2008; Avolio,. et al, 2010; Day, 2011). Given that leadership competencies or needs must be aligned to the organisation's strategy and business objectives, the issue around strategic organisational alignments and relevance provides a huge challenge to the effectiveness of developmental interventions (Cacioppe, 1998; Fulmer & Wagner, 1999; Hernez-Broome & Hughes, 2004; Weiss & Molinaro, 2006). Until they are aligned, the relative strategic impact of development activities remains an area of conjecture and wishful thinking (Sheehan, 2005).

Meldrum and Atkinson (1998) identified key shortcomings in developmental strategic appropriateness were an ambivalent, or even negative, attitude of business line management towards the organisational influence of human resource professionals and their planned interventions; the ability of organisational managers to act as good role models; and, aligning strategic organisational needs to developmental interventions. These factors reveal a lack of systemic alignment and organisational integration and that strategic organisational relevance is still a key problematic area for leadership development (Bailey & Clarke, 2008).

Researchers have attempted to mitigate these issues by identifying key design and construction principles for effective leadership development programmes (Cacioppe, 1998; Fulmer & Wagner, 1999; Weiss & Molinaro, 2006; Tourish & Pinnington, 2007; Leskiw & Singh, 2007). These researches have been synthesised in **Appendix D** under seven construction factors.

2.8.2 Contextualisation

An important theme in leadership development is generating a learning experience which requires actors to learn from their work, in their work, and with real-life work issues (Moxley & O'Connor Wilson, 1998; Day, 2001). The roots of this are in situational leadership; that leadership is a contextual phenomenon, where the most appropriate leadership skills vary dependant on social and environmental contextual contingency (Dexter & Prince, 2007). This observation was mirrored in a plea for greater commitment from researchers to reconnect individual leaders with the social context and the strategic planning context (Mabey, 2013). James (2011) proposes that leadership development, in order to be more efficacious, needs to be "*driven out of context and the challenges that leaders in the organisation face collectively*" (James, 2011. p.4).

This means organisations and training providers must be creative in how they incorporate direct linkages between leadership development and operational contexts for their leaders; for example, using action learning group-work, real-life simulations and contextual scenarios (Dexter & Prince, 2007; Bennington & Hartley, 2009).

Furthermore, a recent report by energy sector giant BP identified that content on their leadership development programmes needed to change as to reflect changing needs, and that the content be more applicable, as it was observed that content was too broad and generic to be applicable to day-to-day real life (Brown, Eagar & Lawrence, 2005).

An example of how organisations are changing programme content to match contextual needs is found in the increasing use of multiple models for cultural leadership. Specifically aimed at developing leaders who might operate successfully across different cultures and countries, where there are

different preferred forms of leadership (Hoppe, 2004; Turnbull et al., 2012). The effect of the internationalisation of leadership concepts is a potential shift in constructs and development methods (Cacioppe, 1998; Barret & Beeson, 2002; Hernez-Broome & Hughes, 2004; Figliolini, 2008; McDonnell at al., 2008). This example is pertinent for the military and energy sector, who conduct the significant portion of their operations globally. Furthermore, this example exemplifies linkages between leadership development and a SAEI perspective of leadership. Turnbull et al. (2012) identifies that in order for organisations to apply an anthropocentric approach to cross-cultural leadership development they must view leadership as a dynamic social process, with a strong focus on communication, coalition-building skills, compromise, negotiation and self-awareness (Barker, 2001).

Another example of a contextual challenge is the rise of technology, which has a significant impact on how leaders manage perception. A greater degree of scrutiny from public and media outlets will put additional strains on leaders (Hernez-Broome & Hughes, 2004). Technology has also been a key factor in the accelerated pace of change and the speed at which leaders must respond to events (Hernez-Broome & Hughes, 2004; Hargie & Tourish, 2011). Technology has also allowed leaders to lead their teams virtually (Hernez-Broome & Hughes, 2004); a vital evolution in successfully leading an internationally-spread organisation, where face-to-face leadership is exceptional. Technology and distance have also changed the role of training in leadership development, where e-learning and web-based development has risen in prominence; equally, mentoring and coaching have migrated in parts to technological platforms (Hernez-Broome & Hughes, 2004).

Integration of developmental content with day-to-day contextual workplace activities is vital in habitualising developmental objectives (Cacioppe, 1998). Integration must extend from line management, through appraisal systems and career management processes, to talent management and succession planning provisions (Cacioppe, 1998; Leskiw & Singh, 2007). A pervasive, integrated leadership development programme will affect the wider culture and performance within an organisation (Weiss & Molinaro, 2006), such as the program at GE (Immelt, Govindarajan & Trimble, 2009). Examples of integration are: developmental competency or skill being added to performance appraisals and promotion criteria (Cacioppe, 1998); and, participant project teams completing real-time leadership issues assignments (Leskiw & Singh, 2004).

Furthermore, Cacioppe (1998) expressed the potential dangers if contextualisation is not done; that considerable effort and expense taken during the program would be lost, as it is not actively encouraged and reinforced within the person's actual work environment, as the learning environment had failed to mirror real world, situational needs. Bregman (2013) endorsed this requirement for leadership programmes to be integrated into work itself; such as using real-time meetings or planning

groups to provide leadership coaching on individual leadership. Utilising support, which can observe and advise in the actual environment where leadership occurs, may allow a seamless transition between learning and real-world.

Finally, without incorporating contextual differentiation into leadership development interventions, there is significant risk that the leaders will be confused as to the effectiveness of the pedagogy and to the expectations of their organisations.

2.8.3 Performance

The performance of participants conducting leadership development is fundamental to the efficacy of the learning experience. As discussed earlier, with respect to Adair's (1997a) recognition that only 'spark' moments in a developing leader can generate meaningful change, and Avolio's (2005) need for 'life events' to punctuate participants' life stream model; it is incumbent on the participant to invoke and subsequently demonstrate learning through leadership development.

Performance feedback has acquired a vital role in developing effective leadership behaviours and skills (Day et al., 2014). Indeed, there is an intrinsic role of performance feedback in leadership development. It might even be hard to assimilate how an individual can potentially develop - in areas often unknown to them - without the role of performance feedback (Day, 2011). The role of feedback is important in defining what perception there is of an individual as a leader (Avolio, 2005) and its regenerative function of promoting learning (Day, 2011).

However, in practice, assessing leaders' performances suffers from an ancient infirmity, one where human ego counter-acts transparency, self-awareness and regulation. The 17th century French philosopher Blaise Pascal drew out this problem in *Pensées* (1670):

> "*The nature of self-love and of this human ego is to love self… He cannot prevent this object that he loves from being full of faults and wants. He wants to be great, and he sees himself small. He wants to be happy, and he sees himself miserable. He wants to be perfect, and he sees himself full of imperfections. He wants to be the object of love and esteem among men… This embarrassment in which he finds himself produces in him the most unrighteous and criminal passion that can be imagined; for he conceives a mortal enmity against the truth which reproves him, and which convinces him of his faults. He would annihilate it, but, unable to destroy it in its essence he destroys it as far as possible in his own knowledge and in that of others; that is to say, he devotes all his attention to hiding his faults both from others and from himself, and he cannot endure either that others should point them out to him, or that they should see them…*" (p. 42)

The problem of egotism, which results in disguising faults and imperfections, is common in leadership theory - reflected in issues like hubris (Kets de Vries, 1990), narcissism (Rosenthal & Pittinsky, 2006) and Machevilian leadership phenomenon (Drory & Gluskinos, 1980) - and can pose a considerable challenge to efficacious leadership development. This challenge is extant the more senior a leader is in the organisation, as they become more powerful and influential, and where followers are even less keen to offend (Tourish, 2007). Here leaders experience phenomena such as *ingratiation* or *boss' allusion* which are responsible for promulgating negative behaviours (Tourish, 2007; Tourish & Hargie, 2011) and not challenging the sort of things leaders should desist from (Drucker, 1955). Pascal perceived this dynamic:

> *"It is this false delicacy which makes those who are under the necessity of reproving others choose so many windings and middle courses to avoid offence. They must lessen our faults, appear to excuse them, intersperse praises and evidence of love and esteem… Hence it happens that if any have some interest in being loved by us, they are averse to render us a service which they know to be disagreeable. They treat us as we wish to be treated. We hate the truth, and they hide it from us. We desire flattery, and they flatter us. We like to be deceived, and they deceive us*…" (p. 44)

This deception may inhibit leadership development if issues that invoke embarrassment or offence, for the leader, are taboo and thus avoided; therefore, as such, negative and challenging feedback, which is accurate and true, may be shunned in developmental initiatives.

At present, within leadership development, feedback is seen as an important tool. This commitment to provide feedback to individual leaders on their performances, potentially deals with this tension, however there is a strong propensity in the literature to promote positive feedback, which may skirt around key sensitive issues, in an effort to remain 'positive' and non-confrontational (Hernez-Broome & Hughes, 2004). This is not without merit, as indeed, research has demonstrated that positive feedback can generate reinforcement motivation for repeated future performance (Hernez-Broome & Hughes, 2004; Day, 2011). Whilst it is acknowledged by researchers that feedback should aim to be meaningful and developmental; not merely flattery for the high performers, reassurance for the mid-table performers, and criticism for the laggards; in practice it remains to be seen if this commitment is maintained.

As not all feedback will have a positive impact on receiving individuals (Avolio, 2005), it is here that Pascal's problem may manifest. Avolio (2005) proposes that development does not occur without challenge or conflict in leadership development. This proposition holds that challenging life events

adjust an individual's life stream model, invoking a developmental mediating relationship of *life model > challenge/conflict > life event > behavioural change*.

Consequently, leadership development must be challenging, even generating productive conflict (Avolio, 2005). Remediating unproductive or inappropriate behaviours is central to meaningful development; therefore the tension generated by challenging programmes may create the sort of breakthroughs where substantive development occurs (Avolio, 2005).

The reason feedback has emerged as an important component is because managers believe there are not enough opportunities to learn whilst conducting their jobs and feedback is one of the simplest methods of promoting learning (Howard & Wellins, 2008; Day, 2011). Day (2011) states a key tenet of both goal setting and learning theories is feedback; as actions with subsequent feedback have an increased likelihood of learning potency. Indeed, feedback is a useful catalyst for changing an individual's self-evaluation in terms of perceived competency, goal setting and self-steem (Bandura, 1997; Cacioppe & Albrecht, 2000). A key deduction of Day (2011), referring to research by Ericsson, Krampe & Tesch-Romer (1993), is that in order for an expert leader to achieve expert status, constant on-the-job feedback is necessary to facilitate accelerated development.

Finally, performance feedback need not necessarily be between a manager and a subordinate. In fact, research has shown that most employees prefer to receive feedback from individuals other than their line manager (Cacioppe & Albrecht, 2000). Such perspectives are seen as been balanced, honest and removed from formal authority structures.

2.8.4 Impact

Another cardinal theme of the extant literature, indeed a "significant obstacle" (Day et al., 2014. p.15), is the need to evaluate the impact of leadership development interventions on individuals and organisations (Avolio, 2005; Hopgood, Smith & Woodcock, 2006; Dexter & Price, 2007; Day et al., 2009; Avolio, Avey & Quisenberry, 2010; Mabey, 2013). Day (2001; 2014) has repeatedly identified evaluation as a key imperative for organisations to correctly assess the impact of developmental interventions, so that a deeper understanding of how leadership development potentially contributes to greater operational effectiveness and corporate performance. Fundamentally, Avolio (2005) states that evidence supporting the efficacy of leadership development is vital in justifying investments; indeed, few organisations attempt to quantify benefits financially (Avolio et al., 2010), with several researchers stating there is an over-bearing pressure, even future vulnerability of leadership development, to demonstrate return on investment (Avolio, 1999; Kincaid & Gordick, 2003; Hernez-Broome & Hughes, 2004; Day et al., 2009).

However, measuring impact appears to be problematic, as research is consistent in the observation that it is more difficult to provide meaningful, demonstrable and compelling evaluative impact of learning on soft-skills, cultural and inter-personal factors (Thackwray, 1997; Dexter & Prince, 2007). Mabey (2013) points out that structured approaches to evaluation of hard skills development where they have a finite time-span and unambiguous application is much more straightforward, whereas assessing the impact of leadership development interventions requires a more sophisticated approach, tracking shifts in attitude and mind-sets over periods of time, and unravelling leadership development causality from other cultural and organisational processes and phenomena.

Despite an apparent urgent need for evaluation it has been observed that less than 10 percent of leadership development programmes are being evaluated for impact (Avolio, 2005; Day et al., 2014). Evaluating the impact of leadership development is intrinsically complex due to issues of attribution and factor inter-dependability (Burgoyne, 2004; Gentry & Martuneau, 2010): i.e. *what are the causal linkages in the learning experience? What, specifically, causes what?* Evaluation can be made complicated by changing contexts or long periods of time between interventions and outcome measurements (Day et al., 2014). These issues have led to a chorus of pleas in regards to more evidence-based evaluation approaches (Reade & Thomas, 2004, Dexter & Prince, 2007; Day, 2011) and despite issues of attribution and ambiguity, recent research has demonstrated a greater need for evaluation in validating and justifying developmental expenditure (Day, 2011). This should be extended to all developmental interventions, and is a natural progression from Beaton and Richards' (1997) training and development evaluation criteria of: if a greater percentage of the organisation is engaged in the development (and linkages to confirmation of 'message' promulgation), and, if the developments will have an impact on critical business processes.

Custodians of developmental interventions must conduct a systemic strategic review and critically analyse the entire learning process, as to whether it has delivered the business wide value, organisational development and competitive advantage intended (Cacioppe, 1998; Fulmer & Wagner, 1999; Leskiw & Singh, 2007; Tourish & Pinnington, 2007). Only this will provide organisations with evidence of programme-generated organisational impacts (Martineau & Hannum, 2003; Hernez-Broome & Hughes, 2004). This systemic review will involve revisiting the objectives, as they may have changed, and the philosophy of how, when and where the programme is run (Cacioppe, 1998). This activity often suffers from insufficient time allocation; lack of senior executive consideration and thought; subjectivity and insufficient structure or thoroughness in the process (Cacioppe, 1998). Once a thorough evaluation is done, the impact on the program in terms of remedial change or adjustments

are carried out, and the cycle continues. Effective leadership development programmes are not one-off cycles, but constant processes over long periods (Avolio, 2005; Day, 2007).

Furthermore, leadership developmental interventions must align personal and collective motivational needs, as personal development has emerged as a significant motivational factor for leaders conducting leadership development, and career advancement and greater leadership responsibilities are perceived as desirable outcomes of the acquired learning and development experience (Groves, 2007; Cunningham, 2010). If succession planning and career advancement are not intrinsically linked to the interventions there is a material risk that this key motivational aspect is negated or ignored.

Attempts to evaluate programme impact have been conducted using qualitative and quantitative methods. Typically, organisations evaluate non-rigorously, focusing on employee satisfaction surveys and participants' reactions to interventions; few organisations attempt to quantify improvements in individuals' skills and behaviours using the scientific method (Day, 2011), This has led to several quantitative, mathematics-based approach, focusing on monetary valuation (Cascio and Boudreau, 2008; Avolio et al, 2010). Despite these efforts there are still mixed responses to applying Return On Investment metrics to measuring the benefits of developing human capital (Phillps and Phillips, 2001).

Researchers like Purcell et al. (2003) and Thackwray (1997) propose financial measurements are the weakest measures to apply, instead measurements around cultural or softer issues, such as behaviours and attitudes, should be the main focus of evaluation. A key factor in this approach is the requirement to maintain and reconcile a mid- to long-term view to development (Dexter & Prince, 2007). Some high profile organisations, with track records for effective leadership development, such as General Electric (GE), chose not to focus on ROI, but rather rely on human feedback from a number of sources to ensure that learning and change was occurring and that they are still hitting the mark (Fulmer & Goldsmith, 2001).

Gentry and Martineau's (2010) longitudinal study suggests hierarchical linear modeling (HLM), over a five year long leadership development context, is helpful in evaluating the facilitation of change in leaders (Peters et al., 2007). Measuring change involves assessment at the individual level - of skills, knowledge and abilities - and at group level - of culture, climate and productivity over 'way-points' to map change over periods within two extremities. The data is 'nested' in a context (i.e. workers within a particular work group) to allow relational analysis within and between levels (Hofmann, 1997; Gavin & Hofmann, 2002). This method identifies a key aspect of evaluation, and points out that leadership development evaluation should examine individuals, nested within teams, nested within

organisations; or individuals nested within organisations, nested within countries. This represents an organisational perspective, as well as individual.

Another example of impact evaluation is found in a UK public sector leadership development initiative (Hopgood, Smith & Woodcock, 2006). This evaluation approach identified a six-themed evaluation framework aimed at measuring the impact of leadership development interventions at the organisational level. This systemic impact orientation is vital for evaluating impacts on issues like organisational development and social capital development. The framework was intended as a checklist guide; however, flexibility was built in for extracting or including headings to match specific business needs. The six themes of the model are described in **Table 2.2**.

Impact Evaluation Theme	Description of measurements
Appropriateness and Relevance	Within this theme, evaluation measures include the extent learning and development interventions align with the business needs of the organisation or the extent to which learning and development addresses current and future capabilities. The model identified examples of sources of evidence might come from organisational business plan and reviews, divisional and team plans, or personal development plans.
Key Performance Outcomes	Examples of evaluation measures were assessments against key performance targets or quality frameworks. Or internal and external inspections. With sources of evidence coming from key performance results, best value assessments, or achieving awards, e.g. Investors in People, Charter Mark, etc.
Organisation's Value System	Evaluation measures include the extent to which staff are aligned with organisational values, and the extent partners and stakeholders are aligned with values. It also includes measuring the extent to which leaders' model organisational values in their behaviours and interactions. Sources of evidence for these measures include staff and attitude surveys, communication and culture audits and outcomes of 360 assessment.
Outcomes of Learning and Development	Examples of evaluation measures include career development and progression, staff turnover and retention, proportion of personal development plans achieved and completion and attendance rates on development programmes. Sources of evidence examples were staff appraisals, performance review data (including 360 assessments), personal development plans and human resources department records.
Community Impact	Evaluation measures include external stakeholder perception of organisation as being a responsible citizen, community and staff involvement, and involvement in multi-agency initiatives, such as collaborative programmes. The sources of evidence include community partnership awards, stakeholder surveys, focus groups results and partnership reviews and audits.
Return on Investment	Examples of evaluation measures were analysis of cost/time of development interventions, calculations of opportunity costs and value for money assessment. Sources of evidence might be found in key performance results and performance league tables, as well as various people results metrics, e.g. staffing records, staff levels, staff turnover, sickness levels, grievances etc.

Table 2.2 - Summary of Evaluation Approach. Source: Hopgood et al. (2006)

The evaluation framework (**Table 2.2**) by Hopgood et al. (2006) endorses a systemic and SAEI view of leadership development, emphasising the importance of community impact, strategic appropriateness

and relevance of design and delivery, as well as the role of organisational values in generating systemic alignment through inspirational motivation and idealised influence (Bass, 1985). The inclusion of 'community impact' explicates a SAEI perspective, where shared collective and relational needs are elevated as strategic imperatives. These impact factors promulgate the proposition that leadership development must orientate away from merely egocentrism and personal development towards collective alignment and shared advancement. Although this framework is for application in the public sector, thus representing greater social and community orientation, rather than private sector, its potential appropriation in the military, which is also a public service sector, is obvious, and recent strategic shifts in the energy sector towards greater collaboration, with government and private industry, might also hint at this model's relevancy (Wood, 2014).

It is a significant factor for evaluating the impact of leadership development interventions as to whether they are having a systemic effect across the organisation, and not just at individual developmental levels. Research by the Chartered Management Institute, surveying 1,500 managers in 2001, and 2,113 managers in 2014, each time rated the perceived quality of leadership in their organisations as being poor and lacking. A key finding from this research was the identification that participants recognised that the quality of leadership was likely to be higher in organisations where there was a systemic approach to leadership development interventions (Chartered Management Institute, 2001; 2014).

This issue exposes that impact should focus on dyadic, group and systemic organisational factors in developing capability (Day & O'Connor, 2003). This progression is demonstrated in **Figure 2.4**, which shows the multi-dimensionality of developing a comprehensive leadership development methodology, and the breadth of inclusiveness required to implement a systemic program.

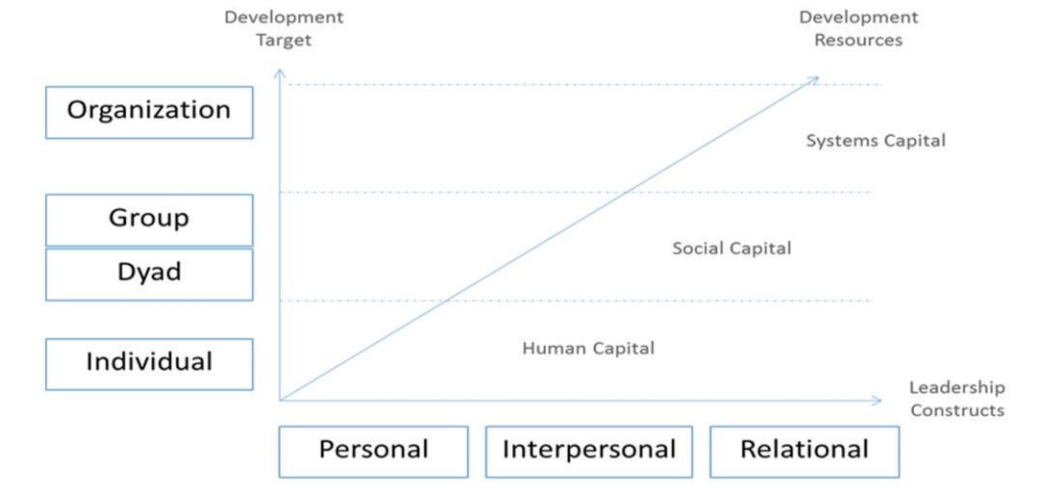

Figure 2.4 - Multi-dimensional Perspectives. Source: Day and O'Connor, 2003

The researchers identify that as leadership constructs and developmental resources inflate, leadership phenomena increasingly becomes the property of group and organisational levels (Day & O'Connor, 2003). This implies that at such levels leadership requires inter-relational and -relational interaction, resulting in social and systems development (i.e. culture and processes). This does not mean that individual development becomes less-important, rather, neglecting this would result in them being insufficiently equipped to deal with the corporate leadership environment, however, it does provide a broader context, with parameters, within which individual leaders align, operate and behave (Day & O'Connor, 2003).

Finally, an important aspect, mentioned earlier, of generating positive impacts at organisational levels is found in the suggestion that ten thousand hours is a reasonable timeframe to expect leaders to achieve expert status in leadership (Day, 2011); if true, there is a significant demand put on organisations to create a requisite quantity of leadership development interventions. Presently there is no scholarly research that considers correlatively if the quantity of leadership development conducted within an organisation has a demonstrable effect on the quality of organisational leadership. Knowledge is needed as to the quantity of leaders who should conduct leadership development interventions and whether there is a critical mass, where beyond a certain volume the learning and development has positive impacts on organisational leadership.

2.8.5 Values

Values have always been an essential ingredient of safeguarding humanity. As far back as the Athenian sages, ethical concepts, embodied in taxonomies, were seen as the humanising element of a 'better person' and that they were refined habitually by repeated practice (Howard, 2015). It is this art of practice, following their identification, which concerns leadership development.

By *values*, we mean a relativistic ethical code, categorised to assume the ethical needs of shared constituents, such as ethnic groups or business organisations. Examples of common constructs are Christian or Hindu values, or family values (Benson, 1996). By relativistic, the values are not the same, necessarily, across all social groupings. This is distinct to *virtues*, which are determined, by definition, such as the perennial cardinal nomenclatures of Confucius, Plato or Aquinas (Lewis, 1952). These virtues take on an assertion of objective truth; where they hold true for all peoples, regardless of constituency, and represent universal moral principles, such as prudence, justice, temperance and courage (Lewis, 1952). Though values and virtues can be viewed differently, relative and determinative, both are frameworks of ethical conduct.

But it is the concept of *values* which relates to this study; as this study considers the ethical conduct of constituents of particular social groupings: namely, those nested in different sectors and organisations. Furthermore, each of these different organisations have codified their own relative views on ethical conduct; exemplified in corporate or organisational values frameworks.

Corporate values reflect the sort of interactions which are important to an institution and its members, and also their stakeholders. In essence, corporate values are a corporation's institutional standards of behaviour (Van Lee, Fabish & McGaw, 2005). Generally, companies follow a value cycle, where they articulate a set of corporate values and embed them in management practices, which are intended to reinforce behaviours that benefit the company and communities inside and outside the organisation, and which in turn strengthen the organisation's values (Van Lee, Fabish & McGaw, 2005).

In 2004, a global study by Booz Allen Hamilton and Aspen Institute, surveyed almost four hundred companies, and found that companies were increasingly making their values explicit, primarily because they were "*questioning the quality of their management systems and their ability to inculcate and reinforce values that benefit the firm, its various constituencies, and the wider world*" (Van Lee, Fabish & McGaw, 2005. p.4). This systemic beneficial-impact aspiration is consistent with the SAEI perspective of leadership proposed earlier in the discussion. The study identified the vital role corporate values has in guiding companies through challenging times, and particularly that leaders make values visible during this guiding process. This was the case at US company Xerox Corporation, where corporate values were recognised as 'saving' the company during the worst crisis in their history, and that "*living our values*" was key (Van Lee, Fabish & McGaw, 2005. p.1).

Values and leadership are inseparably entwined (Brown, Treviño, & Harrison, 2005; Northouse, 2007; Yukl, 2010; Ciulla, 2014); and, as with other attributes, like intellect and social etiquette, they must be nurtured (Barza & Cohen, 2015). Indeed, leadership environments that neglect their development or negate their necessity, through promulgating immoral behaviour and conduct, albeit even unconsciously, promote the sort of value-less leadership that repudiates SAEI perspective leadership. There are plenteous examples from recent business history to demonstrate this point: Enron in 2001, Lehman Brothers in 2008, HP Autonomy in 2012 and Volkswagen in 2015. Failing to nurture value-based leadership is like neglecting to water a plant and being surprised by its withering. In a macabre metaphor, the great Oxonian, C.S. Lewis captured this paradox in *Abolition of Man* (1943):

> *"We make men without chests and expect from them virtue and enterprise. We laugh at honour and are shocked to find traitors in our midst. We castrate and bid the geldings be fruitful."* (p. 35)

The role of values and moral perspective has emerged as a cardinal leadership development component, with a fundamental positioning within some of the major leadership models: Transformational (Burns, 1978; Bass, 1985; Bass, 1990; Bass & Avolio, 1993; Brown, Treviño, & Harrison, 2005), Charismatic (Weber, 1958; Conger, 2015), Servant (Greenleaf, 2002; Scouller, 2011) and Authentic Leadership (Avolio & Gardner, 2005; Gardner, et al., 2011). Luthans and Avolio (2003) asserted that authentic leadership development encompasses an inherent ethical and moral component. This assertion was supported in a subsequent paper proposing that the inclusion of a positive moral perspective is crucial to the emerging work on leadership development (Avolio & Gardner, 2005). Multiple researches describe the personal and social identification processes that followers experience whereby they come to identify with leaders and their values (Avolio, Gardner et al., 2004; Avolio, Luthans et al., 2004; Gardner et al., 2005; Ilies et al., 2005). Furthermore, it is values held by leaders, and their demonstration, which provides the necessary idealised influence for effective followership (Bass, 1990). It is the demonstration and acknowledgement of values that provides consistency between leaders' words and deeds; and is an assurance that SAEI leadership is being practiced and not merely egoistic or self-advancing agendas.

Values assure positive social exchanges through value congruence and principles of reciprocity, between leaders and followers (Blau, 1964; Graen & Uhl-Bien, 1995; Ilies et al., 2005). If leaders generate positive social exchanges by maintaining personal integrity and relational orientation, leader–follower interaction and relationships will be characterised by respect, positive affect, and trust. These characteristics and strong relationships will then procreate greater value congruence and follower reciprocation in the form of behaviours and exchanges that are consistent with the leader's values (Avolio & Gardner, 2005). It follows, if these values are consistently applied, via efficacious leadership development, across an entire organisation, systemic propagation and alignment is possible.

Conger and Benjamin (1999) demonstrated that the US Army promulgates leadership values through an extensive socialisation process, where leaders learn and internalise the US Army's values and standards through years of direct interaction with more experienced leaders and by conducting leadership development. This interaction demonstrates a shared commitment to educate widely the expectations of value-based leadership across all levels of hierarchy and occupational specialties, and amongst followers. In the US Army, this responsibility to promulgate training and professional development, with regards to values and standards is considered one of the most important responsibilities of all Army leaders. This process of social exchanges and socialisation provides clarity and reinforcement of the US Army's values along with the duties and expectations associated with

carrying them out. The US Army maintains that such an integrated social system builds a corporate understanding of the character, attributes, and skills that its leaders are expected to possess and a shared dedication to the values and ethics that drive its culture, organisational development and operations (Conger & Benjamin, 1999).

Hamilton & Bean (2005) argued for the importance of context, as influenced by values, in leadership development. The authors placed context and values in a mediating relationship, as catalysts for reality construction and leading organisational change (Hamilton & Bean, 2005). They proposed that leadership concepts, which are leader-follower interaction orientated, and focused on developing servant-leaders in social and cultural contexts, would generate a systemic leadership focus that collectively shapes and shares a corporate vision. The fundamental components of achieving this mediating relationship were to highly contextualise developmental interventions and to place the greatest emphasis on developing beliefs and values that were social and cultural context-aware (Hamilton & Bean, 2005). These beliefs and values are rooted in a notion of 'service'; that leaders primarily exist to serve others: clients, customers, shareholders and employees. This notion of service is the fundamental characteristic of military leadership in the British Army, most notably expressed in the maxim of the Royal Military Academy (RMA) Sandhurst: *Serve to Lead*.

In the 2012 RMA Sandhurst guide *Developing Leaders*, doctrine explicates that ethos shapes values, and values drives behaviour. Leaders are directed to embody the values, setting a consistent and strong example, both at work and out of it. To simply preach core values achieves little; the emphasis is struck on demonstrating them and living them; through this they are effectually conferred (Royal Military Academy Sandhurst, 2012). Adherence to those values is necessary, and may require those joining the Army to change their own personal values and behaviours.

Furthermore, the values of the British Army are seen as being necessary in order to conduct the sort of operations demanded of it, in some of the most challenging and hazardous environments. This observation is mirrored in energy companies, where a review of their public relations corporate strategy reports shows there are evident consistencies with regards to corporate values: such as honesty, integrity and respect for people; honesty and integrity and corporate citizenship; constant care, humbleness, uprightness; and, respect, courage and one team.

A notable author who understood the entwined nature of values and their effect on the systemic, was Nobel Peace Prize nominee, logician and philosopher Robert Hartman (1910-1973). Hartman, in his magnum opus *The Structure of Value* (1967), argued that all human beings were driven by evaluative judgment. He proposed that human evaluative systems were not based on the products of thinking or

feeling phenomenon, but rather an axiological phenomenon (Byrum, 2006). Within this perspective, Hartman believed that values - expressed as 'organised goodness' - better assess the ultimate motivations and implications of rationality and emotion (Byrum, 2006); in essence, people make *valued judgments*. Most importantly, leaders' values - whether morally good or bad - drives judgement, which then drives decision-making, which in turn generates future performance. This reveals an axiological sequential relationship for linking values to future leadership performance. This allows for certain reasonable predictions, with regards to leaders' behaviours: where morally-sound values are evident and implicit within a leader, there is a causal sequence that would suggest positive, future performance will be a product of those values. The same is true, if leaders' values are not morally-sound, resulting in a converse and negative sort of future performance. Thus a key charge of leadership development is to mitigate against this risk and develop the sort of 'organised goodness' that leads to positive future benefits.

Leaders' values, beliefs and personal heuristics have a major impact on setting organisational culture (Denison & Spreitzer, 1991; Trice and Beyer, 1993; Schein, 2006), and create ethical or values-norms that guide the behaviour of groups and collectives in a top-down direction (Schaubroeck et al., 2012). How these values enact with regards to structures and processes depends entirely on how individuals create meaning to the validity and role of values (Denison & Spreitzer, 1991). It is the responsibility of leaders to align followers' values and identities to those of the organisation (Brown & Treviño, 2009). Any culture that emerges is a product of a complex group learning process, of which leadership plays a key influential part (Schien, 2006). As a group learning process it must be treated as a systemic phenomenon, with individual leaders interacting with organisational cultural needs, as well as followers, in reciprocating adapted and functional systemic manifestations (Bass and Avolio, 1993; Ogbonna & Harris, 2000). This significantly hints at a socially constructed view of leadership, more of which is discussed in Chapter Three.

Importantly, without concerted effort to systematically develop corporate values, competing values will likely emerge within organisational culture and development (Dowling & Pfeffer, 1975; Denison & Spreitzer, 1991). Methods by which leaders transmit this culture are embodied in leadership development practices, like teaching, coaching, role modelling and selection (Smircich, 1983; Jaskyte, 2004; Byrum, 2004; Glaser & Pilnick, 2005). As the responsibility to systematically develop organisational values lies with organisational leadership, leadership development becomes a strategic platform for instilling and nurturing them (Denison & Spreitzer, 1991). Furthermore, it is suggested only a pervasive, integrated leadership development program will affect the wider culture and performance within an organisation (Weiss & Molinaro, 2006); such as the program at General Electric

(Immelt, Govindarajan & Trimble, 2009). In the case of General Electric, the agency for enhancing culture and performance - the DNA code, providing consistency and golden thread - was the corporate values of the organisation. To achieve this there has to be measurable, clear linkages between the corporate values and leaders' behaviours and the effect this has on the working environment of followers.

Finally, an important feature of integrating corporate values and leadership development is viewing it as a product of social capital (Day, 2001; Day & O'Connor, 2003). This social capital is essentially value-based relationships which manifest as forms of mutual obligations, reciprocity, trust and respect (Brower et al., 2000). This supports the need for organisations to clearly identify and articulate corporate values and values-based leadership. Indeed, it is within social capital that Day (2001) identifies a clear example of how leader, individual, and leadership, social, development are entwined.

2.9 Identifying Theoretical and Praxis Contributions

The literature review conducted in this chapter thus far has critically exposed fundamental issues in theoretic and practical understanding of effacious leadership development. It is widely recognised that approaches are demonstrating diminishing returns and that programme authors are experiencing significant problems in generating systemic leadership quotient in their organisations, through their interventions.

Furthermore, diminutive knowledge has been demonstrated with regards to identifying key factors of influence in generating efficacious leadership development, across the cardinal themes, and, in particular, how it promotes systemic leadership development, consistent with a SAEI view of good leadership, and its association and relationship to transformative approaches and leader-follower-context reflexivity.

Crucially, there is still limited understanding for how leadership development generates social capital within organisations; moving the emphasis of development, and impacts, away from the individual towards the collective.

Thus, providing evidence and sense-making for how certain factors of influence contribute towards effacious *systemic leadership development* might be located in critically analysing how the cardinal themes from our literature review – *Delivery, Contextualisation, Performance, Impact* and *Values* – relate to an analytical framework for generating systemic leadership development.

An essential part of conducting that analysis will be providing a working definition of what constitutes 'systemic leadership development', to be used as a scrutinised construct, and that will be identified in Part Four of this chapter.

In addition, there is also a potentially important contribution to be found in conducting a comparative analysis of sector applications, where one sector is highly recognised for its approach to systemic leadership development (i.e. the military), and how a critical qualitative analysis of intervention application can contribute to praxis-orientated theoretical postulations and recommendations.

PART FOUR – CONSTRUCTING A SYSTEMIC LEADERSHIP DEVELOPMENT DEFINITION

2.10 Human and Social Capital: Local versus Systemic Leadership Development

A crucial factor in drawing out empirical extrapolations from the research data is determining clear definitions prior to analysing the empirical data. This is vital for mitigating measurement errors (Mahoney & Goertz, 2006) and for generating a focus for measuring the existence and strength of key variables (Lagnado et al., 2007).

As we have discussed in Part Three of this chapter, leadership development is frequently poorly defined, leading to inaccuracies and misunderstandings regarding how constituent variables are interconnected and relate to each other (Bolden, 2005; Day, 2011). It is therefore vital to construct a specific working definition for this research, which will shape the exploration of the cardinal themes for critical analysis and extrapolation.

A vital step in creating a specific working definition is to differentiate between two fundamental aspects of developing leadership quotient: *individual-* and *group-orientated* leadership development. The differentiation first emerged in the writings of Day (2001, 2007, 2011) and Van Velsor et al (2010). Stated simply, leader development is an investment in human capital; whereas, leadership development is an investment in social capital.

However, a key problem for the theoretical domain is that literature has not continued to promulgate and explicate this differentiation; researchers are still referring to individual and group approaches synonymously as 'leadership development' (Avolio, 2005; Day, 2011); subsequently, viewers are required to extract differentiated meaning and application from the research findings, which can be problematic (Bolden, 2005; Day, 2007, 2011; McCallum & O'Connell, 2009). Therefore, it is important to elucidate a differentiation of meaning by constructing a clear definition for the purposes of this current research thesis, which explicates leadership development as a social capital investment, taking existing notions and expanding those for greater theoretical understanding.

Very few initiatives, in practice, address collective, group-focused leadership development, despite the observation that the effects of leadership development are most directly felt in the social setting of an organisation, primarily through working cooperatively towards common goals (Kaagan, 1998; Bolden, 2005), despite calls from researchers (Day 2007, 2011; DeRue & Ashford, 2010). Rather, in practice, leadership development programs have tended to focus on leader development (Day, 2001; Van Velsor et al., 2010). For this reason, there is a need to develop an inclusive culture of shared, socially based, leadership within organisations, not just focused on personal development (Day, 2001; Bolden, 2005; Cunningham, 2010); where until now leadership development has been focused on egoism, self-interest and personal development (Tiratsoo, 2004; Bolden, 2005; Cunningham, 2010); rather, what is needed is to develop leadership as a collective entity and seen as an organisational project, comprising formal and informal interventions (Cunningham, 2010; Mabey, 2013).

McCallum & O'Connell (2009) suggested the key breakdown in the effectiveness of leadership development, with regards to an individual-based focus, is perhaps found in the Anglo-American-led approach of localised leader development. The proliferation of MBAs, fast-track career management programmes, personal development planning has led this focus on leadership being about personal improvement (McCallum & O'Connell, 2009). Cunningham (2010) argued further that individualistic approaches to leadership development are too limited; since leadership only exists in social contexts. Moreover, leaders play out their roles within organisations, which are located within a culture, system and structure. It is for this reason that leadership cannot be addressed in the abstract; it is necessarily context-specific. Individual-focused leadership development can promote egocentric leadership models, which may be damaging to organisations and their people. Coupled to this, the "*notion that an individual can attend a course away from organisational reality and be moulded into a leader able to work in any context is fundamentally faulty*" (p.6). Consequently, Cunningham (2010), amongst others, have suggested that there is little evidence to suggest that self-development programs has any measured effectiveness on organisational leadership development (Baldwin & Padgett, 1993; McCallum, 1999). This was supported by other research that argued the development of small numbers of individuals in isolation is unlikely to result in demonstrable improvements in organisational performance (Bolden, 2005), and that leadership development should be beyond just targeting the best, and look to be all encompassing (Ready and Conger, 2003).

Therefore, it is essential that leadership development takes a more relational view of leadership as a process involving everyone, or as many as practicably possible, within the organisation. A view fundamentally concerned with the development of collective organisational capacity (Day, 2001;

Bolden, 2005). This shift in viewing leadership as a social function, opposed to a personal development one, is the driver for shifting towards a systemic view of leadership development.

Such a systemic shift was described by Day (2001).

> "*Leadership is conceptualised as an effect rather than a cause. Leadership is therefore an emergent property of effective systems design. Leadership development from this perspective consists of using social (i.e. relational) systems to help build commitments among members of a community of practice.*" (p.583)

This explanation might be accused of being idealistic in practice (Bolden, 2005); however, the military provides a strong and recognised example of an organisation that focuses social systems in leadership development (Adair, 1997a; Wenek, 2005; McGonagill & Pruyn, 2010).

Furthermore, McDermott et al (2011) argued that collective leadership development is about establishing processes that expand the organisational cache of individuals who can assume leadership roles and processes, and that organisations should become a process of negotiation and collaboration between leaders. This collaborative and interactive view demonstrated unequivocally that leadership is a collective activity, demanding a union of human and social capital development. Therefore, the most effective mode of developing leaders is working with groups of leaders on what is needed cooperatively to progress the organisation (Cunningham, 2010).

Essentially, any wider-organisational, systemic view of leadership development must seek collective developmental endeavour, where social systems subsume leadership, and context is inextricably interwoven within processes; with social capital building networked relationships, enhanced cooperation, interpersonal and resource exchange, and created organisational value (Bouty, 2000; Day, 2001). Ultimately, it is grounded in a relational model of leadership, supported by mutual obligations, reciprocated trusts and loyalty (Drath & Palus, 1994; Brower et al., 2000; Day, 2001). Any notion of a relational model of leadership development must recognise leadership as an inter-relational process between leaders and followers, moulded by the context (Fielder & Chemers, 1974; McCallum & O'Connell, 2009). This triangulated relationship dictates that leadership development must progress beyond human capital development needs to social capital development. Indeed the goal of social capital leadership development would be to triangulate these relational needs through developing interpersonal networks and cooperation within organisations as a social system, appropriate capabilities, connections, systems and culture (Pearce, 2004; Bolden, 2005; McDermott et al, 2011).

McCallum and O'Connell (2009) state that focusing leadership development purely on personal development under-values the current and future social capital needs of the organisation to the detriment of organisational development. Consequently, what is required is a reversal of priorities from "'*parts to systems', 'status and roles to processes' and 'individual knowledge to partnerships*'" (Bolden, 2005. p.8), this will allow a new focus on leadership development which reflects on the development needs of the organisation, as a social entity, instead of the individual. It is this movement from human- to social-capital development that signifies a shift from what might be termed *local development*, which is reliant on individuals' maximising experiential learning and willingness to learn, to *systemic development*, which relies on individuals situating themselves within a social context, and where leader-context integration, using structures and processes is paramount (see **Figure 2.5**). The former uses intrinsic factors as the motivational force, whereas the latter uses contextual extrinsic factors as the motivational force.



Figure 2.5 Leadership as Local and Systemic Developmental Phenomena. Source: Author

Developing and expanding a deeper understanding, based upon synthesis generated by Day (2001), of the differences between *local* leader development and *systemic* leadership development is demonstrated in **Table 2.3** with the main areas differentiated. Day (2001) draws out the fundamental differences in leadership model and competency base; with human capital showing an intrinsic awareness and developmental orientation, and social capital focusing on extrinsic, relational and conceptual adaption orientation.

Comparison Dimension	**Development Target**	
	Leader	Leadership
Capital Type	Human	Social
Leadership Model	Individual *Personal power* *Knowledge* *Trustworthiness*	Relational *Commitments* *Mutual respect* *Trust*
Competence Base	Interpersonal	Interpersonal
Skills	Self-awareness *Emotional awareness* *Self confidence* *Accurate self image* Self-regulation *Self-control* *Trustworthiness* *Personal responsibility* *Adaptability* Self motivation *Initiative* *Commitment* *Optimism*	Social Awareness *Empathy* *Service orientation* *Political awareness* Social skills *Building bonds* *Team orientation* *Change catalyst* *Conflict management*

Table 2.3 - Summary of Differences Between Leader Development and Leadership Development Source: Day (2001)

Table 2.3 clearly reinforces that leadership development as social capital seeks to develop appropriate inter-relational social capabilities, connections, systems and culture (Day, 2001; McDermott, Kidney & Flood, 2011). These are crucial aspects of a systemic view of developing leadership.

A greater understanding for what these aspects consist of, in developmental terms, requires further extrapolation and synthesis from wider literature in order to construct a systemic leadership development definition. Subsequently, three principle factors emerged: *collective synergies, organisational development* and *social structures and processes*.

These will now be discussed in detail.

2.10.1 Collective synergies

A systemic leadership development definition must express how leaders and followers assess themselves as a collective instead of simply promoting them to develop and reflect on themselves as individuals (Day, 2001; Day & O'Connor, 2003; Avolio, 2005). This collective context brings leadership into a much broader, collaborative definition; where there are extricable links, weaving together cause and effect and unity of effort. A collective focus would generate multi-level team building across the organisation (Day, 2001; McCallum & O'Connell, 2009), as well as significant evidence for forging and maintain commitments (McCallum & O'Connell, 2009), beyond formal authority structures, and demonstrating transformative leadership traits (Liden et al., 2014).

Within systemic leadership development, teamwork acts as a mediation for collective learning, leading to increased team leadership capacity (Day, 2011). Day's (2011) team leadership capacity model uses the resources of individual members (knowledge and skills) and the formal leader's resources (leadership knowledge and skills), and whilst supported by developmental interventions, utilizes those cumulative resources for the team's subsequent performance activity. This repeated cycle generates team development, resilience and adaptability in dealing with future challenges and complexity. It is widely recognised that fundamental to team development is the application of feedback on performance, allowing teams to adapt and regulate (DeShon et al., 2004; Ilgen et al., 2005) and the role of the leader in supporting the team's progression from novice status to highly adaptive (Kozlowski et al., 2009), and would indicate a direct link between developmental methods and social capital development.

Hu and Liden (2011) propose that theories of leadership as being a 'service of others' is a multidimensional construct and at the individual level makes a unique contribution beyond transformational leadership and Leader-Member-Exchange theories in explaining community citizenship behaviours, in-role performance, and wider organisational commitment. This particular research (Hu & Liden, 2011) found no between-leader (group-level) differences in the outcomes. This is an important variable, in that it identifies consistency across developmental themes and application. Such findings promote the affective synergy of an SAEI perspective of leadership and a systemic leadership development approach.

The merchandise of generating collective synergies would be the attendance of trust, cooperation, goodwill and reciprocity across the organisation (Barney & Hansen, 1994; Brower et al., 2000; McDermott, Kidney & Flood, 2011) and a heightened sense of social awareness and demonstrating a strong culture for feedback and challenge (Day, 2001; McCallum & O'Connell, 2009).

2.10.2 Organisational development

Systemic leadership development must contain reference to its generative impact on organisational development (Day, 2001; McCauley & Van Helsor, 2004; Bolden, 2005; Cunningham, 2010). This would involve the organisation defining what it expects of its leaders, by setting direction and alignment (Day, 2001; McCauley & Van Velsor, 2004), and by preparing people for roles and situations beyond their current experience (Bolden, 2005).

It must also align leadership development with social and organisational imperatives (McCallum & O'Connell, 2009; Day, 2001). Given that organisational development has been defined as being "*a system-wide application of behavioural science knowledge to the planned development and reinforcement of organisational strategies, structures and processes for improving an organisation's effectiveness*" (Cummings and Worley, 2001. p.1), it is vital that strategic imperatives are integrated into leadership developmental interventions; with a social connectivity within these imperatives. It is recognised that leadership can be valuable in affecting organisational performance (Bolden, 2005), hence, a social imperative is to align leadership with organisational imperatives in order to construct a systemic view of leadership that is collectively distributed across entire organisations. A key facet of effectively integrating organisational and social imperatives is the involvement of senior managers in any leadership development approach (Kotter, 1988; Popper, 2005). Moreover, organisational development must be distributed organisation-wide, and managed from the top (Beckhard, 1969), with a complex educational strategy that changes structures, values and beliefs, as external and internal forces change and require adaption from the organisation (Bennis, 1969). It is understandable how organisational development has moved towards individual development from its origins, due to the strong emphasis on applying behavioural sciences for individual development (Cummings and Worley, 2001). However, this has led to a dominance of organisational behaviour and human resource management, over business-needs and drivers (Hardacre & Peck, 2004). There is a need to realign social and operational imperatives, at the systemic level, in order to enhance organisational performance.

Intrinsic to organisational development is cultural development (Ready & Conger, 2003). By adopting a systemic leadership development approach this can demonstrate an organisation-wide commitment to enhance organisation effectiveness and organisational health, with culture and social processes which are reflexive and self-examining, and can effectively adapt to change (Hardacre & Peck, 2004). Indeed this reflexivity must allow the organisation to examine its social processes, such as planning and decision making, and institutionalise this examination process and legitimise its applicability or

validity (Burke & Hornstein, 1972). A systemic approach can embed leadership development into organisational culture, as part of the fabric that weaves everything together (Ready & Conger, 2003).

Central to cultural development is stimulating acute social awareness, across all levels of organisational leadership (McCallum & O'Connell, 2009). Systemic leadership development interventions should focus on work-related groups of people, and their beliefs, values, and the human process between them (Hardacre & Peck, 2004), by promoting sense-making, organisational learning, action research and whole systems thinking (Hardacre & Peck, 2004). Cultural development and social awareness are essentially value-based relationships which manifest as forms of mutual obligations, reciprocity, trust and respect (Brower et al., 2000). This clearly supports the need for organisations to clearly identify and articulate corporate values and values-based leadership.

2.10.3 Social structures and processes

The third definitional characteristic of systemic leadership development is the creation or reinforcement of social structures and processes (Day, 2001; Ready & Conger, 2003; McCauley & Van Velsor, 2004; McDermott, Kidney & Flood, 2011). The social structure of interactions - regarding the relative location of each and every individual actor(s) and their contacts - has been demonstrated to provide enhanced benefits and resources to both individuals and organisations (Burt, 2000; Day, 2001). This structure is formed as a result of the commitments among all parties within a social network (Day, 2001). How these social and relational processes develop leadership could be linked to a claiming-granting process, whereby actors claim and grant leader identities through the mutually reinforcement within social interactions and the broader organisational context, and is a dynamic (i.e. changes over time) phenomena (DeRue & Ashford, 2010). Importantly, the integration of leadership development and social and network systems provides common, and established, platforms for strategic alignment, relationship building and communicability. Also, fostering cooperation, coordination and networks through leadership development extends the reach and influence of developmental interventions. Given that research has demonstrated that leadership development of itself is insufficient in developing adequate leadership quotient in organisations, leadership must be seen as a collective and shared activity, forcing the cascading of leadership across the wider organisation. Maintaining organisation-wide structures and processes to support this cascading expands the organisational cadre of individuals who can assume leadership roles and processes (McDermott, Kidney & Flood, 2011). As with the other two factors, social awareness fundamentally underpins the efficacy of application, and a high degree is prerequisite for success.

2.11 Systemic Leadership Development Working Definition

The previous section fashioned a differentiated view of leadership development as a *systemic* social capital investment and thence produced foundations for a working definition of systemic leadership development. Those foundations for a definition are demonstrated in **Table 2.4** which summarises the three definitional characteristics for a systemic construct.

Systemic Leadership Development Three Definitional Characteristics		
Collective Synergies	**Organisational Development**	**Social Structures and Processes**
• Team building • Forging and maintaining commitments • Trust, cooperation, goodwill and reciprocity • Feedback and challenge • Social awareness	• Setting direction and alignment • Social and organisational imperatives • Cultural development • Social awareness	• Integration with social and network systems • Fostering cooperation, coordination and networks • Social awareness

Table 2.4 - Breakdown of the Three Definitional Characteristics for Systemic Leadership Development. Source: Author

Further to the basic building blocks in **Table 2.4** systemic leadership development is principally concerned with building interpersonal competence, and defining the nature of the interaction between individual, social and environmental. This endeavour is consistent with the needs of a SAEI perspective of leadership.

Systemic leadership development might also be viewed as an organisational development strategy, which seeks to generate transformative levels of leadership integration, across entire organisations, and not merely in individuals. In this sense, systemic leadership development must be seen as a strategic endeavour, which assists people understand how and in what way they should relate to one another, how their efforts are integrated, build and develop commitments and values and develop broad social networks by contextualising their understanding and role within the organization to the higher social and organizational imperatives (Day, 2001). This would be long-term in focus, contributing towards progressive, strategic orientation in the business, and counteract the influence of egoism and short termism (Day, 2001).

Lastly, promulgating a systemic view of leadership development is not to entirely elevate social capital above human capital, organisational above individual, but to merely emphasise particular focus on it, with the intent of understanding the phenomena deeper, that progress might be made in a unification of concepts (Day, 2001).

Thus, deduced from the above analysis, a working definition of systemic leadership development can be extrapolated and constructed, and used alongside **Table 2.2**. This definition provides the core of the analytical framework for data analysis, discussed in Chapter Three.

Below is the working definition of systemic leadership development for this research thesis:

> "Systemic leadership development must have a collective and relational orientation (social awareness), which seeks to demonstrate long term organisational impact, rather than egoistic impact, through generating efficacious collective synergies, organisational development and social structures and processes."

CHAPTER THREE

RESEARCH DESIGN AND METHODOLOGY

RESEARCH PHILOSOPHY AND STRATEGY

3.0 Introduction

Chapter Three will describe in detail the rationale behind the extant research design and methodology. It will critically review the diverse nature of the research phenomenon, followed by critiquing leadership development as a theoretical learning process and the intrinsic multifarious nature of the phenomena; resulting in a clear commitment to utilise a social constructivist lens to observe systemic leadership development phenomena. The chapter will then identify the selected data collection and analysis methods, by outlining the application of a qualitative research approach, with a case study method, supporting by a validation study, and a conceptual analytical framework.

PART ONE – NATURE OF THE RESEARCH PHENOMENON

3.1 Nature of the Research Phenomenon

Part One considers the phenomenological nature of the research study and identifies an ontological and epistemological paradigm within which to contextualise the research framework and analysis. Ontological in a sense of categorising the nature of reality (Hudson & Ozanne, 1988); and epistemological, in the sense of defining the relationship between researcher and reality (Carson et al., 2001).

Hart (1998) identified that recognising the alternative views of ontological reality will alter how we establish what can be accepted as being epistemologically real, which will provide us with different strategies or approaches for validating claims about reality. Therefore, it is essential for this research that any data collection, handling and analysis techniques are consistent with the research aims and strategy, and with a phenomenological paradigm that most ably represents plausible realities.

There is no water-tight defence of applying any one single method over another, as there are well-versed problems in applying all for them (Johnson & Duberley, 2000; Ritchie, 2010; Easterby-Smith et al., 2002). However, a diligent effort must be made to apply a paradigm view which is consistent with the research problem and strategy.

The main paradigms available for this study are: *Positivist, Realist* and *Constructivist*. The following section will review the characteristics and suitability of each. For this research, the key deduction is which perspective most accurately portrays, or allows the greatest amount of meaningful insight, into the learning and developmental phenomena of systemic leadership development.

3.1.1 Appropriateness of utilising a Positivist perspective

The positivist paradigm asserts that the scientific method can define objective truths, and that this is done by systematically and statistically measuring relationships between variables (Cassell & Symon, 1994). The core of the positivist view is that objectivity can be achieved; that truth and facts can exists outside of the observations and subjectivity of the observers (Johnson & Duberley, 2000). For this reason, positivism suits scientific research, where experiments and testing of known and controlled variables can be achieved, and where accurate predictions of future outcomes can be precisely made.

Within the field of management research this perspective is aimed at generating more predictability in operations and controls; focusing on the functions of management and process (Johnson & Duberley, 2000). The desirable outcome being the production of prescribed laws and governance methods.

Key characteristics of this paradigm are 'observer independence' - that the observer is in no way influencing the data - and 'neutral observation language' - that the observer is at a distance, maintaining a neutral stand point. The focus is to produce accounts and facts of the situation which correlate to an independent reality (Johnson & Duberley, 2000). However, these demands generate incompatible friction with the phenomenological nature of leadership; that is to say, it is intrinsically about contingent human beings and their subjective human experiences (Grint, 2005). This view of the inaccessibility of objectivity in human experience is dominant in the existentialist epistemological view, as promulgated by Nietzshe (1844-1900) and Dostoyevsky (1821-1882). It is assumed human experiences are too detached from observational reality to allow deducible truths through the scientific method.

Therefore, does the positivist paradigm provide an accurate and insightful platform for addressing this study's research questions? The key issues are around whether leadership development experiences and practices can be truly independently observed in controlled circumstances; and whether such accounts could be reduced to statistical variables, producing generalisations, where cause and effect were clearly identifiable and recordable. Particularly troublesome for this research would be the explicit identification of all relevant and influential causal variables. It is recognised that when reflected

against the research questions, the positivist paradigm offers limited application and meaningful insight of the given phenomena. Therefore, the positivist paradigm does not suit this research.

3.1.2 Appropriateness of utilising a Critical Realist perspective

The Critical Realist paradigm is based on an assumption that reality has an inherent nature or structure that can be identified through various epistemological approaches and methodological procedures (Reed, 2005). It seeks to bridge the gap between Positivism and Hermeneutics (Constructivism), by focusing on producing clear causal explanations, whilst maintaining an Interpretivistic view on the nature of social reality (Blaikie, 2007; Bhaskar, 2008).

Of the two principal premises of Critical Realism, the first, that social phenomena are intrinsically meaningful (Sayer, 2000; Bhaskar, 2008), and secondly, that there exists a reality independent of our representation of it (Bhaskar, 2008; Reed, 2005); it is the second of those premises that is problematic for this field of study. Defining objectively what constitutes leadership is extremely fraught (Grint, 2005). This is due to the phenomenological and dynamic nature of leadership, and the inseparability of individual, social, contextual subjectivity.

Critical Realism has proven its applicability for various management research (Tsoukas, 1994; Modell, 2009; Ritchie, 2010), however these examples consider aspects of organisational management that have compelling evaluative outputs: accounting systems, performance management, and management roles and functions. Precisely the areas of organisations where leadership has failed to demonstrate a clear causal-explanatory effect and, isolated, positive impact (Tourish & Pinnington, 2007).

Therefore, does the Realist paradigm provide an accurate and insightful platform for addressing the research questions? Not without significant problems. It is problematic in its commitment to provide purely an objective causal-explanatory method for identifying underlying structures and mechanisms (Reed, 2005). This is problematic for leadership, where objectively stated causal linkages are extremely hard to identify, due to multifarious and often un-observed causality, dynamism, and unique socialisation and contextualisation.

3.1.3 Appropriateness of utilising a Constructivist perspective

The Constructivist paradigm has its roots in phenomenology. Phenomenology is the study of subjective experience (Husserl, 1963; Sokolowski, 2000). It systematically reflects upon the interactions between phenomena and consciousness and how we frame concepts and notions of reality. Essentially, it studies the structures of experience and how they relate to the development of a first-person point of

view (Merleau-Ponty, 1945; Husserl, 1963). Constructivism developed further understanding of the effects of those experiences and reflective cognition on constructed forms of realities (Husserl, 1963).

The constructivist perspective emerged in the mid twentieth century. Whilst not always explicitly referred to as "constructivism" or constructionism, the similarities of concepts and vocabularies are obvious. Authors like Jean Piaget (1896-1980) and Lev Vygotsky (1896-1934) set the perspective in motion.

Categorically, constructivism is made up of various types: *radical, cognitive, situated, cultural, sociocultural, critical* and *social*.

Within the field of education studies, social constructivism includes the views of socio-cultural, cultural and critical perspectives (Davis & Sumara, 2003). The socio-cultural view is concerned with matters of the emergence of particular bodies of knowledge and social collectives. The cultural and critical view is less constructivist than the others, but shares focus on collective phenomena. Power tends to feature prominently, as does ethics and morality. In this view, leading is synonymous with enculturisation (Davis & Sumara, 2003).

There is a high degree of contingency in constructivism; not the objectivity of a critical realist position. It can have multiple view-points, inconsistencies and irregularities. In this sense, deducing truths has a striking similarity to understanding history and philosophy; which requires critical rationality and context differentiation for meaningful explanation.

In terms of praxis, Davis and Sumara (2003) and Fairhurst and Grant (2010) have observed in the field of education that there are recognised issues with transplanting constructivist theories further along the continuum towards praxis. This is mostly due to issues of examining learners' representations of the external world. Even to the learner, cause and effect might be unknown or even mistaken; and to observe cognition is more problematic than to observe learning; or at least the phenomenological constituent parts of learning.

However, despite the authors' observation that the constructivist view has experienced issues with pragmatically modifying teaching, they do state that constructivist discourses can "*operate as critiques of institutional attempts to affect individual knowing or collective knowledge*" (Davis & Sumara, 2003. p.418). The generating of these critiques has been observed to be effective in previous research, where strong, demonstrable constructivist linkages with teaching practices, such as group work, discussing learning and student-centred instruction have occurred (Davis & Sumara, 2003). A notable observation being "*communication is never a matter of information transfer, but of perturbation and construal.*

Hence, educators should not confuse 'explanation' with 'teaching'" (p.419). This has led to new, constructivist, approaches in the classroom, such as:

- *'The constructivist teacher is a facilitator'*
- *'Students should have lots of opportunity to interact and explore'*
- *'Start with what the student knows'*

Essentially, how constructivist theory contributes to practice is indirect. Critiques are offered which might direct future applications, like suggestive framing. Observations which frame future methods and actions. Such an approach most adequately cogitates differing contextualisation (Davis & Sumara, 2003).

Furthermore, all constructivism can be dyadically split between 'knowing and knowledge' (Davis & Sumara, 2003; Fairhurst & Grant, 2010). Davis and Sumara (2003) explain this difference as being whether "*individuals construct their own understandings or whether all knowledge is socially constructed*" (p.411). Social constructivism concerns itself with the latter. It also highlights the importance of context in formulating views on reality (David & Sumara, 2003; Grint, 2005; Fairhurst & Grant, 2010).

These two perspectives can be identified as having either a subject-centred, structuralist, view, or a socially constructed view. The subject-centred view essentially maintains that reality beyond individual experience cannot be known rationally, and regards the learner as a closed and inaccessible system (Von Glaserfeld, 1991). Whereas, the socially constructed view allows observation of learning phenomena; bringing into the picture the effects of context and other multifarious causal factors. For the purposes of a case study analysis, the latter of the approaches allows for synergising collective experiences and accounts, as well as triangulation.

It is this broader view of social constructivism which is relevant for this study and is now discussed specifically within the context of this research.

3.1.4 Leadership Development as Social-Constructivist phenomenon

> "*Leadership is a process of transformative change where the ethics of individuals are integrated into the mores of the community as a means of evolutionary social development*" (Barker, 2001. p.491)

This definition of leadership provided by Barker (2001) provides a valuable insight into leadership phenomena, as it captures the development of leadership within a social context as well as an environmental context. Such a definition might otherwise be facetiously expressed as:

> *"…one wouldn't necessarily drop an archetypal bullish and chauvinistic army infantry Sergeant-Major into a Feminist rights group and expect his leadership approach to naturally fit-in! And if one did, and he remained there, in order to lead, how might his individual behaviours change, and those of his colleagues?"* (Author, lecture at Aberdeen Business School, May 2014)

Effective leadership development must account for this multi-relative phenomenological interaction between individual, social group and context or community. Barker's (2001) definition is consistent with the working definition of systemic leadership development and the SAEI perspective outlined earlier, and unites leadership development with an explanation, in social constructivism, that adequately explains the phenomena.

Theories of leadership grounded in systemic thinking and social constructionism exist (Barge & Fairhurst, 2008), though are extremely sparse, due to the extant literature bias towards individualised leader development (Day, 2001; Mabey, 2013). Barge and Fairhurst (2008) proposed that a systemic constructivist approach conceptualises leadership as a co-created, performative, attributional, and contextual process, where the ideas articulated in talk or action are recognised and incorporated by others as they progress tasks that are important to them. These factors are important for this research as they demonstrate a clear precedential example of where systemic orientation and integration is captured by critically analysing socially constructed phenomena.

Epistemologically, social constructivism is a learning paradigm that deals with explaining the phenomena of learning in a teaching environment. It proposes that learners are at the centre of a network of other people, ideas and the external world. Kempster (2009) explicated this network linkage showing that learning is socially constructed and experienced, and that socially-constructed learning is entirely relevant to leadership development; meaning leadership is thus a socially-experienced phenomenon. Furthermore, these networking factors construct a view of reality that is dependent on social factors and context (Wertsch, 1985). Equally, social constructivism examines the way learners make sense of the world through shared experiences and language (Berger & Luckmann, 1991). This represents the core phenomenology of leadership development: an amalgam of shared social context and learning experiences and ideas, carried principally via language and dialogue (Mabey, 2013).

Indeed, the primacy of language and dialogue in leadership has been extensively recognised and reviewed (Barge, 1994; Hargie, Dickson & Tourish, 2004; Groysberg & Slind, 2012). Groysberg and Slind (2012) proposed that language and conversations are core to the activity of practicing and developing leadership. Mabey (2013) similarly proposed that leadership is captured in discourses which in turn are all social constructions. Meaning is not constant across these discourses, and differences lead to contrasting concepts of what leadership actually represents. This, consequently, impacts on the way leadership development in organisations is articulated, practiced, experienced and researched (Mabey, 2013).

The social constructivist view is widely advocated in organisational sciences (Cunliffe, 2009) and is gaining strong currency in leadership studies (Grint, 2005; Barge & Fairhurst, 2008; Grint & Jackson, 2009; Fairhurst & Grant, 2010; Tourish & Barge, 2010). Grint (2005) asserts that leadership context is constructed as a perception-based, political arena, not a scientific laboratory, demonstrating the positivistic position impuissant when considering human behaviour and understanding. This point, in terms of conducting research, was further supported by Easterby-Smith et al (2002) in the table below (**Table 3.1**).

Criteria	**Positivism**	**Social Constructivism**
The Observer	Must be independent	Is part of what is being observed
Human Interests	Should be irrelevant	Are the main drivers of science
Explanations	Must demonstrate causality	Aim to increase general understanding of the situation
Research progresses through	Hypothesis and deductions	Gathering rich data from which ideas are induced
Concepts	Need to be operationalized so they can be measured	Should incorporate stakeholder perspectives
Units of analysis	Should be reduced to the simplest terms	May include the complexity of 'whole' situations
Generalisation through	Statistical probability	Theoretical abstraction
Sampling requires	Large numbers selected randomly	Small numbers of cases chosen for specific reasons

Table 3.1 - Comparing Management Research Approaches. Source: after Easterby-Smith et al, 2002

Social constructivism essentially maintains that people make their social worlds around them; whilst at the same time these worlds make them. This view holds social processes at the heart. This is an alternative position to the Realists' assumption that reality can be truly represented by certain verifiable propositions. Such a grip on true reality is seen as not being possible by constructivists. Nowhere is this more plainly evident than in the field of leadership phenomena (Rittel & Weber, 1973; Grint, 2005). Social constructivists, such as Fairhurst and Grant (2010), show that in leadership phenomena multiple realities dynamically compete for truth and legitimacy. These realities are constructed through social processes, where meanings are negotiated, consensus formed and contestation possible; with structures being both equally stable and open to change as interactions shift over time, like a series of inter-subjective enterprises; where meaning and truth are constructed via social interactions (Fairhurst & Grant, 2010).

Social constructivism, for Grint (2005), describes the subjectivity of the leadership environment; one where interaction and response cannot be determined as objective truths, rather, leadership is a contextual issue, plagued with irreconcilable problems and distracting irrelevancies. Leadership in this sense, a wicked sense, is full of ambiguity and uncertainty; where answers are not self-evident or known. Leadership should thus be entirely viewed as a social interaction between leaders and followers; and between varying renditions of reality and the context. Both rapidly changing and most often misunderstood.

Grint (2005) furthermore posits that the correct leadership response is dependent on the constructed context, which is itself inseparable from social critique. This means that leadership involves the social construction of context, which both legitimises a particular form of the action and the overarching world in the process. This moves the emphasis of the observation from considering 'what is the situation' to 'how is it situated'; regarding leadership as a verb rather than a noun. This shifts our view towards a more proactive and reflexive role of leadership in the construction of context. Grint's (2005) socially constructed view of leadership asserts that whilst leaders are not entirely free to do whatever they wish, they are not altogether determined by the situations they experience to follow determined actions. This interconnectivity between leader and context-situational depends upon what 'reality' has been constructed by the leader and how persuasive their accounts are of the situation, in regards to legitimising their actions.

This is an extension of contingency theory (Stogdill, 1974) which posits that social and structural contexts determine how leaders respond (e.g. situation X requires leadership style Y), therefore meaning the correct response is determined by the correct analysis of the situation. However, in the socially constructed view of leadership, context is actively constructed, de-constructed and re-

constructed by the leader, with respective contingent effects on decision-making. Grint (2005) accounts for this:

> *"…what counts as 'true', as 'objective' and as 'fact' are the results of contradicting accounts of 'reality': that implies that 'reality' is constructed through language and, in turn, since language is a social phenomenon, the account of reality which prevails is often both a temporary and a collective phenomenon" (p.1471)*

This highlights a fundamental tenet of the social constructivist view that language - narratives and discourse - is the manifestation, or expression of peoples' views of reality (ideological, social, medical etc). Furthermore, this language is contained within other modes of communication: such as policies, literature, rules etc (Fairhurst & Grant, 2010). The prominence of language is referred to as being *monomodal* (Iedema, 2007), and represents the huge proportion of extant literature on social constructivism. However, within the context of leadership development, a *multimodal* perspective (Iedema, 2007; Fairhurst & Grant, 2010) is more valuable, as it extends beyond purely language, and also includes institutional factors (social and economic structures) and materials (technology and space); capturing the influence of causal variables such as habits, values, procedures, policies and strategy (Keenoy, Oswick & Grant, 2000). Indeed multimodal factors are nestled amongst all of the communications of organisations and their individual constituents: for example, standard operating procedures, corporate values, ethical policies, corporate literature, marketing materials and management presentations. Furthermore, leadership development initiatives represent a marriage of these factors, with the integration of strategy, values and standards; of operating structures and imperatives; and the individual behaviour of key actors within that environment.

Fairhurst and Grant (2010) and Cunliffe (2009) propose that organisational life is emergent, socially constructed, ideological and political. As this paradigm challenges taken-for-granted realities and encourages the construction of alternative forms of reality, leadership development does precisely this when it brings together groups of managers within an organisation to reflect and develop upon certain themes, values and desirable characteristics of those individuals within the social, organisational context. This infers a necessary link between phenomenology and real-world applicability and observability. Supporting Fairhurst and Grant (2010), authors like Shotter (1993) and Grint (2005) are pressing the field towards praxis, within the social constructivist tradition.

Pearce (1995) identified a dialectic in the development of constructed views of leadership. The dialectic is one of a *social construction of reality* versus the *construction of social reality*. The former being a cognitive process, generating perception; the latter, an interactive process. Through cognitive

processes leaders match perceived characteristics to category prototypes and construct notions of leadership (Medvedeff & Lord, 2006). Various attempts have been made to scientifically capture these realities through schema and sociocognitive research (Lord & Emrich, 2001; Medvedeff & Lord, 2006). Criticisms of how accurate these constructs can be are challenged by researchers reconciling a middle ground in the dialectic; fundamental to the contention is the postulation that reality exists only as perceptions (Calder, 1977). We can merely achieve sense-making via frames and categories of prior experiences. Within this view vocabularies and narratives of leadership actors provide access to perceived-realities (Calder, 1977).

Along the diameter, where there is social construction of reality, is the role of contiguous control moves within social interaction processes (Grint, 2005; Fairhurst & Grant, 2010). Namely, the relational differentiator of having an acquiessence (↓↑) or competitive (↓↓) response to a leader's assertion of control (↓). This factor plays out in the leadership development world with the role of instructor and student, as well situational demands and student, with regards to issues such as the acceptance and adoption of instruction and development (desirable behavioural- and skill-based adjustments), and conformity to organisational expectations (values and standards systems). It also applies to the acceptance of multimodal facets of the initiatives, like corporate ethics, strategy, policy and procedures. Furthermore, the relational control moves develop patterns resulting in long term constructs of influence; one way or the other: either through acquiescence or competition (Fairhurst & Grant, 2010). These relational control moves then form codefined organic and mechanistic systems and patterns over time.

Fairhurst and Grant (2010) provide another important dialectic for social constructivism in the theory versus praxis discourse. Research is naturally progressing towards action science with regards to promulgating practical action theory (Argyris & Schön, 1996; Barge, 2001). Perhaps simply articulated as theories-in-use rather than merely theories (Fairhurst and Grant, 2010). Here theory is seen as an instrumentality (Cronen, 2001), where postulations are made not just as to *what things are*, but rather *what things should be* (Craig, 1995). This generates a praxis-orientation in theory development, where the emphases is on discourse; which is increasingly directed towards praxis (Fairhurst & Grant, 2010).

Another key factor for socially constructed leadership views is reflexivity. In the UK military, Grint and Jackson (2010) identify *Military Doctrine* as an example of such a socially-constructed leadership approach to steering or guiding an organisation and its people in certain reactive, or evolving, directions.

The general developmental processes of leadership development demonstrate a reflexive dialogical practise, where reflexivity and discourse - in its wider sense of communicative interaction between actors and perspectives; trainers and students - combine, generating an awareness of how assumptions, communication and praxis construct our responsive interactions with others (Fairhurst & Grant, 2010; Cuncliffe, 2002; Isaacs, 1999).

The reflexive dialogical position adequately demonstrates how sense-making and giving meaning to interaction is a multifarious process, with multiple, socially based, factors. In leadership development this involves factors such as participants, trainers, senior managers, company culture and values, operating contexts and practices, external and societal factors and the various other relevant stakeholders.

A valuable insight into this phenomenon is demonstrated by research into co-constructed autoethnography within leadership development (Kempster & Iszatt-White, 2012). It demonstrated the importance of non-directive developmental processes, where participants were twinned with highly informed active partners in the leadership learning process. This indirect developmental relationship uses a socially constructed approach to harvesting situated leadership practices; principally by creating discursive opportunities for critical self-reflexivity between developing leaders. Socially constructed notions of effective leadership development and how leadership should be practiced were developed indirectly by this correlative means, away from the classroom or formal workshop interventions. Such a phenomenological observation was also found in this research with "*select superhero trainers*" (discussed in Chapters Four and Five).

Thus, within a social constructivist view of leadership development, participants are also leadership actors of meaning as well as being passive receptors of meaning (Fairhurst and Grant, 2010). This conflated dialogical relationship of constructing meaning is an important observation for theorising the impact and efficacy of leadership development. In this view, systemic leadership development is an assemblage of processes, where participants and trainers contribute structure and meaning to interactions and sentiments, activities and relationships; defining and constructing social orders; through a cycle of negotiation, acceptance and re-negotiation. Thus feeding and evolving, reflexively in relation to one another, through cognitive processing and social interaction. This phenomenological assimilation supports a systemic perspective of critiquing leadership development; where individual, social and context are synergistically captured within an epistemology and ontology.

PART TWO – RESEARCH METHODOLOGY

3.2 Introduction to Research Methodology

The nature of the research problem is both theoretical and practical in its potential contributions. It should also be viewed as socially constructed phenomena, which requires narratives and perspectives to be captured when building constructions of reality. This has certain implications for which methodology is best suited to data collection, analysis and interpretation. These implications will be discussed in this part of the chapter.

Leadership research has experienced an insistent exponential growth over the last two decades (Grint, 2007; Day et al., 2009; Mumford, 2011), as evidences in the plethora of established academic journals, publishing greater amounts of leadership articles than ever before; and also by the frequent emergence of new leadership-themed academic journals (Mumford, 2011). Methodological quality is paramount in furthering best practice or developing an evidence-based underpinning within leadership research (Day et al., 2009). Mumford (2011) identified that leadership as a phenomenon operates at multiple levels of analysis; this complexity makes conventional methodologies irksome and ill-fitting. The multiple facets of potentially affective factors, ranging from 'known' to 'known-unknown' to 'unknown-unknown' sources (Avolio et al., 2010), leaves researchers frequently oversimplifying methodological application or getting lost in contingent complexity (Lincoln & Guba, 1994; Bryman, 2010; Day, 2011; Mumford, 2011). Suggestions that techniques such as hierarchical modelling, within and between analysis and gap identification and comparative analyses may mitigate issues of levels of analysis (Liden et al., 2008; Mumford, 2011).

Mumford (2011) identified five prevalent research methods applied within leadership studies:

- Survey Studies
- Field Investigations
- Experimental
- Historiometric
- Qualitative

Table 3.2 identifies in more detail the considerations and examples of the method. As a percental indicator of usage in leadership research, Mumford (2011) states that roughly 40 percent of the studies published are based on survey methods, roughly 20 percent are experimental, 20 percent qualitative, and 20 percent historiometric.

Five Common Leadership Research Methods (Derived from Mumford, 2011)		
Method	**Considerations**	**Sources / Examples**
Surveys	Dependant on the construct validity or employed measures Surveys often fall foul to four common problems: - Source/method bias is not controlled - Controls for participant reactions are not taken into account - Alternative models proposed are not tested - Incremental validity of survey measures is not assessed (i.e. other available measures)	HInkin & Schriesheim, 2010; Zhou & Schriesheim, 2010
Field Investigations	Relatively Rare. Difficult outside Leader Development interventions. Dependant on quality of assessment measures, and effectiveness of interventions	Hannum & Craig, 2010; Seifert & Yukl, 2010
Experimental	Dependant on the importance of the process being examined, and relevance of performance task to leadership	Hunter, Bedell-Avers; Mumford, 2009
Historiometric	Dependant on quality of material, leading to document coding and sampling	Bedell-Avers, Hunter, Angie, Eubanks, & Mumford, 2010; Bligh &Hess, 2007
Qualitative	Dependant on the isolation of a particular aspect of leadership Dependant on the effective application of systematic content analysis procedures	Ladkin, 2008; Shamir & Eilam, 2005

Table 3.2 - Five Common Leadership Research Methods (Mumford, 2011)

A key problem for leadership research is the scarcity of research and theory exploration specifically in the field of leadership development (Day, Harrison & Halpin, 2009; Avolio, 2011). This issue was clearly described by Avolio, Avey and Quisenberry (2010) in *The Leadership Quarterly*:

> *"…a review of the leadership intervention literature from the last hundred years only produced 201 articles on studies examining the impact of leadership interventions, and less than half where focused on leadership development."* (p. 634)

Despite this situation, there have been some studies - particularly meta-analyses by Burke and Day (1986) and Collins and Holton (2004) - which have shown leadership development to have positive effects on attitudes, behaviours and performance of leaders. However, the summations of these

studies has recommended that more *qualitative empirical* research must be conducted before any firm conclusions can be drawn on the effectiveness of leadership development (Avolio, Avey and Quisenberry, 2010). More research is needed to look at making sense of factors of influence and cognitive-social constructions of developmental interventions; by moving away from purely theoretical analyses towards praxis, theory-in-use situated empirical analyses (Avolio, Avey and Quisenberry, 2010).

Thus, from a review of methodological usage across leadership development research, the approach most suited to this study is a qualitative empirical approach that is praxis-orientated. We will now discuss this in detail, and affirm the merits of applying a qualitative approach.

3.2.1 The Qualitative Approach

Essentially, the qualitative research approach utilises non-statistical research methods (Ritchie, 2010), Qualitative approaches "*examine occurrences in terms of the perceptions of those involved or affected by the occurrence and represent that reality through narrative of their interpretation*" (Ritchie, 2010. p.184).

Usage of qualitative research methods allows agility and depth (Lincoln & Guba, 1994; Mumford, 2011), where quantitative methods are inadequate, in dealing with key factors of data gathering such as:

- Capturing Contextual Information (Lincoln & Guba, 1994). Where variables many have little commonality or predictability. Qualitative methods allow procedures for 'coming to terms with the meaning, not the frequency' of a phenomenon by studying it in its social context (Van Maanen, 1983). This will be important for the research as leadership development initiatives will vary across organisations, as will the individual development experiences of the participants. Therefore, qualitative methods will provide an Emic perspective (Marvin, 1976).

- Inclusion of Meaning and Purpose to human behaviours (Lincoln & Guba, 1994). Only through qualitative methods can personal motivation, desires, emotions and intentions be aligned to leadership behavioural outputs.

- Necessary interaction between researcher and participants (Lincoln & Guba, 1994) affects the inquiry process in assembling the data for the two proceeding points.

A vital factor for the appropriateness of the research approach is the drawing out of meaningful and demonstrable theories from the potentially extensively-variable data. Qualitative methods must effectively "*express the assumptions of a phenomenological paradigm that there are multiple realities*

that are socially defined" (Firestone, 1987. p.16). The 'multiple realities' may well exist in the form of perceptions within an organisational context; each and every one of which existing within a potentially unique social structure or context, such as levels of management seniority or across departments. Such multiple realities will be common within the framework of reflecting upon the development of effective leadership, and within the social constructivist paradigm.

Coupled to this, is an issue relating to the application of appropriate critical analysis approaches and extrapolation of theories in the resolution of 'competing paradigms' in qualitative research (Guba & Lincoln, 1994). Controlling or monitoring the implication of assumptions on the research data findings is essential in validating the accuracy or validity of theoretical inductive conclusions. This research intends to deal with competing paradigms by identifying biases and significant subjectivity issues. A key factor in research subjectivity is tied to the nature of leadership and its intrinsic entanglement with social perceptions (Grint, 1997). In this research any qualitative methodology must honestly represent a balanced view in analysing positive personal developments in regards to leadership values, traits, behaviours and characteristics (Glesne & Peshkin, 1992). Within quantitative approaches, factors such as ethics and values have traditionally been excluded (Lincoln & Guba, 1994); however, within the context of leadership, the analysis of these factors are vital.

Mason (2002) identified that qualitative research engages with things that matter, in ways that matter, and that they provide the utmost persuasive arguments about how particular things *work* in particular contexts. Such "*rich, full… holistic and 'real'*" (Miles, 1979. p.590) insights from research are essential for this particular research study.

Indubitably, the qualitative approach is not without considerable criticisms, such as being a highly labour intensive operation, much energy is required to make data systematically comparable, and qualitative data tends to overwhelm the researcher at every stage (Miles, 1979). Nevertheless, despite these, the positive aspects of utilising a qualitative approach are significantly compelling in this study, and as such were adopted.

3.2.2 Critiquing Relevant Research Methodologies

Selecting the most efficacious research method for the research was a challenging task. An array of relevant options could have been applied; but with varying degrees of appropriateness. Any methodological selection must critically analyse and interpret socially-constructed phenomena, within particular contexts, utilising triangulation - natural setting observations, artefacts and interviewee accounts - in constructing a meaningful understanding of factors of influence phenomena. It must also

allow comparative analysis. A number of interpretive approaches were considered. A brief description of those considerations and their reasons for exclusion are now discussed.

Ethnography focuses on detailed theoretical descriptions of cultural impact on groups, by primarily conducting field observational studies, usually by spending prolonged periods of time with the groups being studied (Hammersley, 1992). There is a strong emphasis on reciprocity between researcher and subjects, which can have a considerable reactivity impact on the research process (Hammersley & Atkinson, 1995). This was undesirable. Also the periods of group-observation was deemed as not practicable or possible.

Grounded Theory has emerged as a widely utilised method within sociology research (Glaser & Strauss, 1967), which aims to generate theories 'out of', or grounded-in, contextual data (Willig, 2007). This is achieved by following a step-by-step process of coding data, generating theoretical sampling and theoretical saturation, resulting in the emergence of new theory. It utilises a constant comparative method, which is potentially desirable. However, *a priori* knowledge of research phenomena can be prejudicial and can lead to natural biases in theorising; thus making it hard to justify theorisation (Kelle, 2005). Equally, the purpose of this research is not to generate a new theory, but to generate a deeper understanding and sense-making with regards to factors of influence in generating systemic leadership development, across the pre-defined systemic definition and cardinal themes of analysis.

Discourse Analysis seeks to uncover meaning and constructions of social reality, as conveyed through discourse (Willig, 2007). Either through Discursive psychology or Foucauldian discourse analytical methods, the method is concerned with how people use language to deal with social environments and descriptions they give to their worlds, which leads to the exploration and theorising of personal experiences (Potter & Wetherell, 1987; Willig, 2007). Although there are obvious overlaps, this current research study seeks to move beyond the power of discourse and take greater account of wider triangulated, contextual and organisational factors.

Narrative inquiry is concerned with the meanings created and conveyed through telling a narrative story. The researcher asks responders to convey experiences through storytelling; this produced narratives which are then analysed within each individual case; then across the group; and finally, re-told by the researcher (Driessnack, Sousa & Mendes, 2007). Narrative analysis differs to other qualitative research methods in the dynamic between the researcher and the responder, in that the responder is in full control of the story that is being covered and creates the links between outcomes and the researcher's understandings and interpretations (Holloway & Freshwater, 2007). However, for this current research study, respondents needed to remain reflective specifically on the thematic

research questions. Emphasising storytelling and flexibility of discourse was not desirable due to limitations in time and scope.

Interpretative Phenomenological Analysis provides a potent qualitative sense-making tool, which works well with constructivist phenomenological analysis. It allows the researcher to develop an account of what an 'identifiable experience', like a participant's experience of a learning programme, means for them, within certain, defined and shared contexts; whilst approaching the phenomena from the participant's perspective, with the emphasis being on the participants' 'lived experience', which is self-reflectively and self-interpretatively expressed through discourse (Larkin, Eatough & Osborn, 2011). Consequently, semi-structured interviews are the primary data gathering tool (Smith & Osborn, 2007; Clarke, 2010). These factors match well the phenomenological nature of the study. However, the method was eventually rejected as it suffered from certain important limitations, specifically, that it is unsuitable for comparative analyses and looks at individual phenomena in isolation. This makes triangulation exceedingly problematic. It also looks to discover meaning not causality. These are fundamental issues for the needs of this current research thesis.

Each of the aforementioned methods demonstrate various degrees of applicability for this current research study, however, it was identified that the most efficacious approach is the *Case Study* method.

Some authors consider case study not as a distinct research method, rather an approach of conducting qualitative research with its focus being the case (Stake, 1995). However, as with other comparative research (Ritchie, 2010; Jones, 2011), the approach should be regarded as a strategy as well as a method for data collection (Hartley, 1994). The case study approach allows a variety of methods of data collection and analysis to be used (Willig, 2008; Creswell, 2013); something which suits the needs of this research. A case study can involve either one single participant/site or multiple individuals/sites (Creswell, 2013). The case study approach has certain important characteristics for this current research study: an idiographic focus, the focus on specific context, triangulation of data (data collection from multiple sources of information), the significance of time (i.e. how things are processed over time) and the use of comparative analysis (Willig, 2008; Cresswell, 2013; Papadopoulou, 2013). It also directly satisfies the wider research context of evaluating cross-sector leadership development interventions.

3.2.3 The Case Study Approach

A case study approach allows a critical synergy of phenomenon and context; this enables the researcher to address contextual factors which may have causal impact on phenomenon (Yin, 1994).

This focus on the nature of the phenomena, rather than statistical generalisations, is vital for considering phenomenology research, such as this research (Yin, 1994; Hartley, 1994). The approach is an effective way of organising social data that preserves the unitary character of the social object being studied (Goode and Hatt, 1952).

Richards (2005) identified that case study analysis provides an excellent framework with which to explore specified themes, by examining subsets of data; an example of which is human experience. This is clearly an important aspect for this research, as it is primarily through human experience we can understand anything meaningful about leadership development processes (see Fairhurst & Grant, 2010). Similarly the cardinal themes of enquiry in this study, as well as the systemic leadership development definition, provide specified themes for critical exploration.

Gillham (2000) considered both the above issues - phenomenon-context consideration and the exploration of human experience - when he identified that case studies are most appropriate when analysing a unit of human activity embedded in the real world. This praxis-orientation is essential if the field of leadership research is to progress farther in resolving real life problems (Day, 2011); indeed, this praxis-focus is core to the research strategy of this study. Gilham (2000) also identified that the case study approach was advantageous when considering phenomena which can only be studied or understood in context. This correspondingly makes the phenomena organic and boundless in the merger of context, time and space, and categorisation. Lastly, he posits the case study approach is appropriate when managing individual, group, institution and multiple cases. These factors play a substantial role in the nature of this study.

There are relevant theoretic precedents to applying a case study approach to social constructivist phenomena (Garnet & Pickrell, 2000; Herbert et al., 2009). Garnet & Pickrell (2000) provided an example of a methodology for benchmarking practices with multiple case study analysis in the construction industry. Although, this current research thesis does not attempt to provide benchmarking, as there have been issues identified with this, such as the inability to identify best practices and difficulties in measuring processes, rather it commits to comparative analysis and observational recommendations. Garnet and Pickrell's (2000) research applied a naturalistic enquiry by conducting the data gathering within the natural setting and context of the participants. This allowed for greater awareness with regards to triangulation.

Another study which applied a case study approach within a social constructivist paradigm is Herbert et al (2009) review of alignment and assessment issues in management education. The authors identified two important factors. *Constructive alignment*, which represented a marriage between

constructivist learning theory - where the learner is encouraged to construct their own meaning of knowledge from learning activities - and the alignment of instructional activities across curriculum design, teaching and assessment (Herbert et al., 2009). Vital to this approach is the identification of qualitative desirable learning objectives and outcomes. Such an observation is also true of leadership development, where this alignment of learning objectives and content design and construction is essential. The other important factor was *Operational alignment*. This is concerned with the fact that students actually learn, and are tested on what they are supposed to learn. These needs must be interdependent with the constructive alignment needs so that students capture learning of what they are supposed to capture, not what they think they are being assessed upon, or what they subjectivity feel is valuable to them (Herbert et al., 2009). The research generated several meaningful observations about drift of alignment, and the need for a shared understanding of the purpose of assessment and a common conceptual framework of learning is fundamental to maintaining alignment. The authors demonstrated how these alignment issues can be measured and observed utilising the case study method within social constructivism.

Notable for this research was Espedal, Gooderham & Stensake's (2013) analysis of social capital development within leadership development programmes. The research produced the sort of paradoxes one would expect from a frontier study in social capital orientated leadership development. The research reflected on the promotion of social capital and knowledge sharing within the leadership development programmes of two multi-national companies. The findings suggested that in one programme, social capital was developed, as participants bonded through group work and interaction with the CEO, and as a consequence, knowledge sharing across the organisation increased. However, for the other program, despite apparent similarities in design and goals, the obverse was observed, with perceived elitism in selection for participation leading to a 'prima donna' effect. There was also a contest-mentality manifest in the participants, with little bridging social capital and knowledge sharing. The researchers proposed that the former organisation was delivering a programme congruent with the typical Scandinavian corporate culture, whereas the latter was at odds with it. This lead the study to a contextual observation: that the problem of social networks and capital is greater in the UK and US, where they differ considerably from Scandinavian organisations; who exist within a societal context of equality and broad participation; where management is characterised by a high degree of equality orientation, non-hierarchical and autocracy (Espedal, Gooderham & Stensake, 2013). Social capital should theoretically flourish in such environments; whereas egocentric contexts, such as reported in the US (Cunningham, 2010), may lead to 'prima donna' phenomenon.

3.2.4 Outlining the Case Study Process

Utilising the work of Yin (2003) an initial process of applying the case study approach was formulated. Being a cross-sector analysis, the model was adapted for capturing two case studies, with subsequent steps of the process (see **Figure 3.1**).

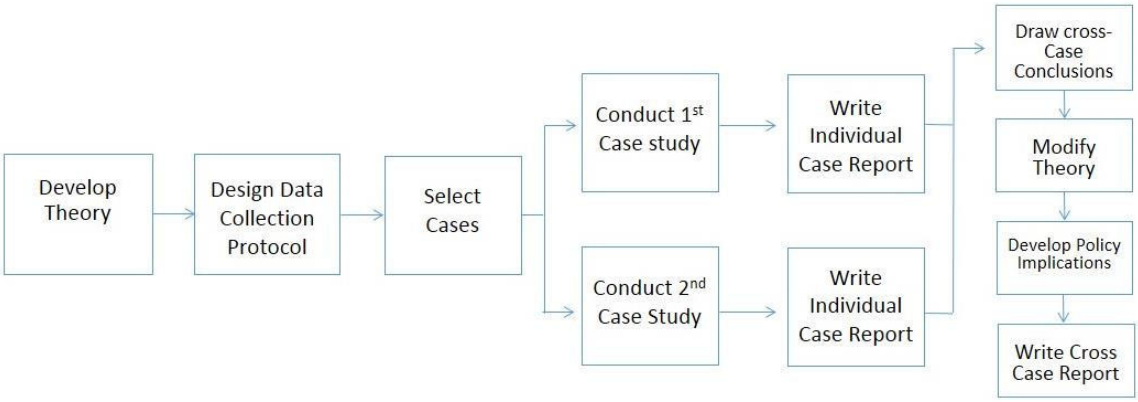

Figure 3.1 - Case Study Approach. Source: Adapted from Yin (2003)

Hartley (1994) describes the investigative process as building evidence within case studies utilising physical artefacts, documentation, interviews, direct and participant observation. Likewise, Yin (1981) explains the forensic process as being a sequence of recording an accurate rendition of facts, followed by careful alternative explanations of these facts, resulting subsequently in a logically-robust, single explanation that is most congruent with the facts. This process is logical in its inference.

3.2.5 Utilising an Extraneous Validation Study to support Case Studies

An extraneous method was utilised to critically test the validity of the cross-case study comparative observations. This extraneous method - in that it is unconnected to the two case studies – shares key similarities and consistencies with the case study criteria, in that the respondents were asked the same questions as the respective case studies, was utilised as a tool for validating inductions.

This detached, triangulation method has been named a 'validation study' to make reference to its purpose of providing additional validation for analytical extrapolations from both case studies. It provides a third party perspective when reviewing comparative observations of factors of influence across the two sector contexts. The validation study comprised asking respondents, who have each had first-hand experience of conducting leadership development interventions within both sample sectors, to specifically reflective upon and make comparative observations, based on their experiences.

This detached validation method and its third party function of testing and validating case study observations is demonstrated below in **Figure 3.2**.

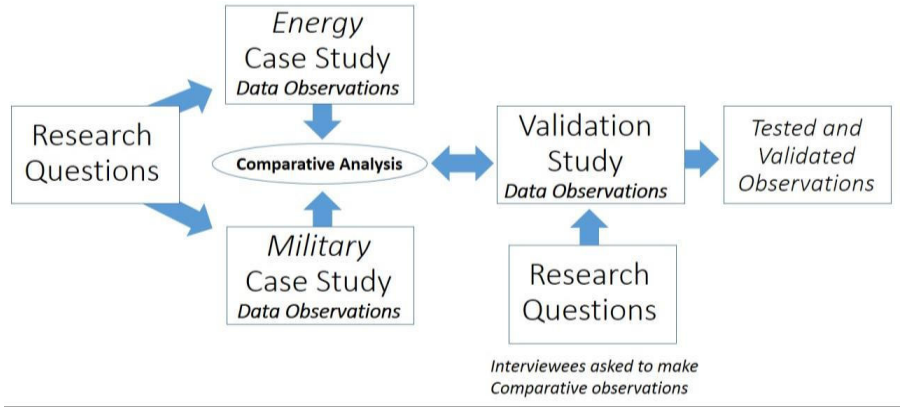

Figure 3.2 - Utilisation of a Validation Study in comparative Case Study analysis. Source: Author

Furthermore, Yin's case study process was subsequently updated with an additional phase to reflect the inclusion of a validation study. This is shown below in **Figure 3.3**.

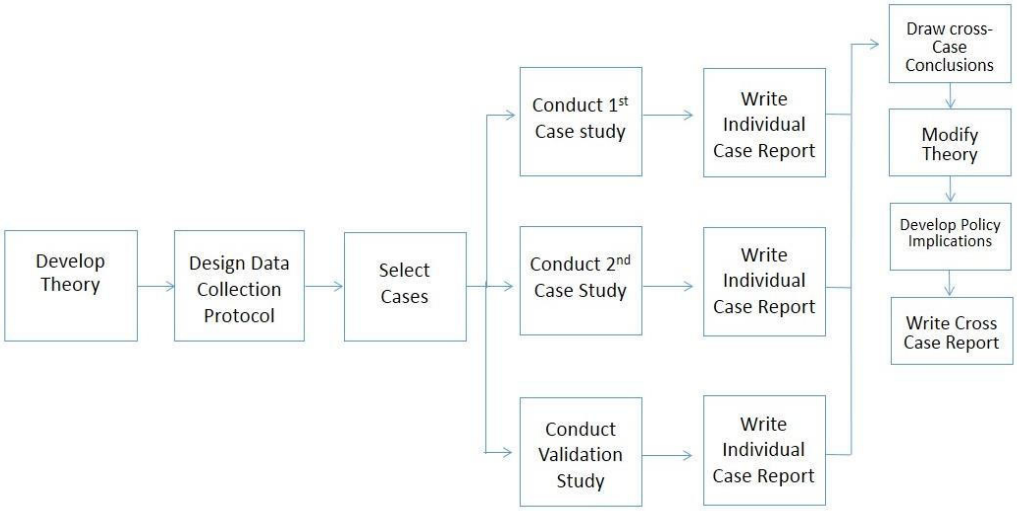

Figure 3.3 – Adapted Case Study Approach. Source: Adapted from Yin (2003)

3.2.6 Criticisms of the Case Study approach

Despite its obvious benefits and application, the case study approach has received criticism for its unmanageability, disputed-findings, and perceived limitations beyond story-telling (Miles, 1979; Eisenhardt, 1989; Stake, 1995). This is mainly due to an inability to provide replicable results that can be applied pan-field of study (Yin, 1994). Yin (1994) presented criticism of the approach identifying investigator bias as influencing the process of data gathering and analysis, and an inherent potential for the investigator to not report all the evidence fairly. However, he recognised that such a bias can exist across all research strategies. Other issues emerged such as a difficulty to generalise from single

case studies; the lengthy ways of recording and writing the case study, being hugely time consuming; reconciling highly complicated data sets; and, the questionable trustworthiness of deductions. However, this last point of trustworthiness is to misunderstand how the term can be applied to a research study such as this; one which is praxis-orientated - that is significantly relevant and meaningful to a practical understanding of the phenomena - which must seek deeper, contextual, descriptive phenomenological accounts of constructed human experience. Furthermore, analytical methods such as triangulation allows rigorous comparison and critical analysis of research findings (Yin, 1994; Ritchie, 2010).

Despite this criticism, Hartley (1994) defends the usefulness and applicability of the research approach, identifying poor application as the primary reason for its perceived lack of efficacy.

There are further reasons why case study is an applicable approach for this research. Ritchie (2010) and Yin (1994) identify that case study is most applicable when there is a lack of empirical studies on the research issues and when there is an explanatory, theory-building nature to the study. These factors are both highly relevant to the field of leadership development where there is a recognised dearth of either of these factors (Day, 2011; Mumford, 2011). Furthermore, the case study approach is appropriate when examining phenomenon regarding human behaviour within the organisational context (Ritchie, 2010). Lastly, Yin (1994) identifies that this approach relies on multiple sources of data and evidence, which must apply a triangulation system of reconciling. All of these points of consistency demonstrate a close relationship to the needs and nature of this study.

3.2.7 A System for ensuring Quality and Validity in Case Study analysis

A vital function of validating research findings from the case study approach is addressed by Yin (1994) who recommends a series of quality tests, aimed at strengthening validation. The Yin Quality Test consists of four components: *Construct Validity, Internal Validity, External Validity* and *Reliability*. What a researcher would desire to see from a positive outcome of the tests is described in **Figure 3.4**.

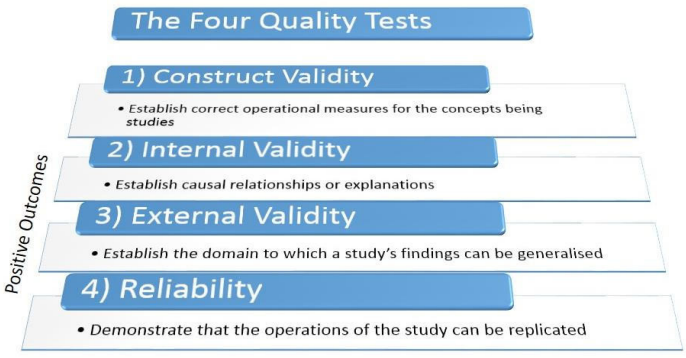

Figure 3.4 - Case Study Quality Test. Source: Adapted from Yin (1994)

The research considered these tests, and applied Yin's (1994) four themes throughout the data collection and analysis phases. For example, at the *Construct Validity* stage multiple sources of evidence have been used, creating a demonstrable continuum of evidence, through interview, observation and documentary evidence. At the *Internal Validity* stage, causal inference has been induced from pattern-matching and explanation generating methods. The conceptual analytical model is discussed in Part Three of this chapter. *External Validity* has been supported by the use of multiple case studies and a validation study, which by way of comparative analysis, has identified unconnected, independent observations, leading to more robust logical replication and validation. Finally, *Reliability* has been achieved by clearly defining analytical methods and case study protocols and strictly following those. Such protocols are described explicitly throughout the remainder of this chapter.

Tactics utilised during the data analysis approach which supported this evidence by way of coding and model regularities are outlined in **Table 3.3**.

Test	Tactic	Phase of Research	Methods
Construct validity	Multiple sources of evidence	Data collection	Analysis of interview transcripts, contextual observations and artefacts
	Establish evidence chain	Data collection	Maintain organised files and records of progress (chronological and developmentally)
	Demonstrating relationships between data and analysis	Data analysis	Draft available for participants viewing
Internal validity	Data triangulation	Data analysis	Compare and match findings from primary and secondary data sources
External validity	Explore rival theories	Research design and data analysis	Research differing / contrary theories
	Validation Study	Data collection & analysis	External perception of case studies
Reliability	Apply study protocols	Data collection	Maintain disciplined approach to applying research methodology

Table 3.3 - Tactics for Applying Yin's Validity Tests. Source: Adapted Yin (1998) & Russell (2009)

Essentially, general validity is derived from an emergent consistency among the triangulated data sources and the expulsion of competing alternative explanations. Whilst examining the consistency and validity across the data source materials supported verification of the findings (Kidder & Judd, 1986).

3.2.8 Describing the Research Data Analysis Methods and Addressing Case Study Theory-building Validity with Eisenhardt's Taxonomy

The work of Kathleen Eisenhardt (1989) was originally developed to support Grounded Theory-building (Glaser & Strauss, 1967), but has subsequently developed as a versatile taxonomy for applying theoretical sampling as a general inductive and iterative approach (Easterby-Smith et al., 2002; Ritchie, 2010). Most importantly, with this model, Eisenhardt (1989) has identified a process for building valid theories from the case study approach (Miles & Huberman, 1984; Yin, 2003). The taxonomy (**Figure 3.5** below) consists of eight steps aimed at addressing theory-building validity.



Figure 3.5 - Eisenhardt's Eight Steps for Addressing Validity. Source: Adapted from Eisenhardt (1989)

The following section will now demonstrate how the taxonomy has been applied to the research.

3.2.9 Theory-building validity - Step One: *Getting Started*

The initial step generates focused efforts in the research by defining the research questions whilst accounting for *a priori* constructs, and allowing for flexibility with regards to theory development.

This complementarity allows the research to define an initial hypothetical model from which data collection can be focused on. For example, in this research the initial identification of cardinal themes of leadership development from existing literature, constitute an *a priori* incorporation into the theoretical framework. As did the experiences of the researcher, who has previously been a participant and graduate of leadership development programmes in both military and energy contexts.

Other examples of focusing the hypothetical model are the creation of a working definition of systemic leadership development; as well as the need to identify factors of influence between the cardinal themes and this working definition.

Fundamentally, the key products of this stage were the identification of research questions and review of relevant literature, as well as the development of an analytical framework for critical analysis.

3.2.10 Theory-building validity - Step Two: *Selecting Cases*

The selection of cases for Case Study research is theoretical sampling rather than random sampling (Bourgeois & Eisenhardt, 1988); meaning the design relies on replication logic, opposed to sampling logic (Yin, 2003). This differentiation is important as sampled cases must be of significant indicative value and specificity, in regards to the theoretical research themes, as to maximise learning and application. The theoretically significant cases can be identified by defining structural, contextual, historic parameters, and predicting the comparability factors in the data collection and analysis phases.

Furthermore, as Step Two focuses the researcher on theoretically appropriate and comparable cases, any disparity in key factors could potentially undermine, even invalidate, the substantiation of constructs and postulations; such as comparing a one day leadership development intervention with a year-long programme. Or a programme that is merely a presentation from a notable public speaker, with no significant engagement with participants; in comparison to one which involves action-learning projects, coaching and mentoring commitments, or stretch assignments.

With regards to maintaining a praxis-orientation, the case studies must be generic enough to be theoretically useful and replicable to other potential recipients, with the respective sectors. Any resemblance or consistency should be easily identifiable for extending theoretical application.

The selection of two cases was based upon defining comparability factors. **Table 3.4** describes those factors.

Defining Selection Criteria for Case Studies
Energy and Military Sectors Selection Criteria: a. High calibre representative of sector operational environment / context b. Representative of general leadership developmental approach and methods c. Relative programme comparability (like-for-like examples: programme size and duration, methods, attendance criteria, desirable traits etc) d. Level of programme development (established programme) e. Recognised effectiveness of approaches and methodologies to develop effective leadership f. Mid-level leadership development delivery g. Cultural and geographical consistencies h. Willingness / ability to participate in study (four levels, multiple participants)

Table 3.4 - Defining Selection Criteria for Case Studies. Source: Author

There were in total four potential cases identified for possible inclusion in the research. Of those four, only two matched the criteria identified above. Those that failed to match the criteria had significant dissimilarities across the criterion; such as, one case was located in the Middle-East region, with primarily indigenous leaders as participants, and the other was an open programme, done in conjunction with a university and had representatives from other companies as participants. However, the two selected cases studies had a high match against the criteria. **Table 3.5** demonstrates this match.

Comparability of Case Studies		
Programme Description	**Energy Sector** - International Leadership Development Academy (multinational participants, operating internationally) - UK-based - Residential - 250 participants per year - 1 year long programme	**Military Sector** - International Leadership Development Academy (no multinational participants, but operating internationally) - UK-based - Residential - 550 participants per year - 1 year long programme
Selection Criteria: a. High calibre Representative of sector operational environment / context b. Representative of general leadership developmental approach and methods c. Relative programme comparability (like-for-like examples: programme size and duration, LD methods, attendance criteria, desirable traits etc) d. Level of programme development (established programme) e. Recognised effectiveness of approaches and methodologies to develop effective leadership *f.* Mid-level leadership development delivery *g.* Cultural and geographical consistencies *h.* Willingness / ability to participate in study (four levels, multiple participants)	**Energy Sector** **Yes** **Yes** **Yes** **Yes** **Yes** **Yes** **Yes** **Yes**	**Military Sector** **Yes** **Yes** **Yes** **Yes** **Yes** **Yes** **Yes** **Yes**

Table 3.5 - Criteria Match for Selected Case Studies. Source: Author

However, it should be noted that after the two cases had been conducted, and subsequent extensive detail and the vastness of data and materials had become apparent, it was acknowledged that further case studies would have be both impractical and too extensive within a single doctoral thesis.

The selection criteria for the validation study were far simpler: the sample respondents must have conducted mid-level leadership development within both the military and energy sector organisations. Individuals were attracted to participate through social media (e.g. LinkedIn '*ex-military in energy*' themed networking groups) and the interpersonal network of the author and university.

3.2.11 Theory-building validity - Step Three: *Crafting Instruments and Protocols*

In Step Three, Eisenhardt (1989) addresses the application of appropriate research methods. In this study multiple data collection methods have been combined in order to enhance the substantiation of hypotheses and theory-creation (Eisenhardt, 1989; Gerson & Horowitz, 2002). The research was conducted by a single researcher: the author.

When conducting field studies, it is suggested the best approach is utilising direct methods (McWilliams et al., 2006); interacting directly with key actors involved in the phenomena under investigation. The most effective direct method is 'semi-structured interviews' (Miles & Huberman, 1994; Trevion et al., 2003; Ritchie, 2010). Interviews allow the researcher to observe as well as simply collect answers (Harrell & Bradley, 2009). It also allows the conversation to deviate, where appropriate, from the researchers set questions, which may generate new thoughts, ideas and awareness in the researcher that they would otherwise not have had access to. Equally, this mitigates some of the issues with research bias, as the interviewee has ample opportunity for clarification, disputation and individualised contribution (Ritchie, 2010).

Supporting face-to-face semi-structured interviews, the research utilised video-conference interviews, email correspondence, as well as a focus group for the validation study (Miles and Hubermam, 1994). On several occasions the video-teleconference interview was used where a physical face-to-face was impossible, for geographical or timing reasons, and was found to be very effective. The only limitation was not being able to read and observe the environment, just the messages from the participant. Email correspondence was only used to supplement pre-existing dialogue with participants; for example, to clarify or develop a prior statement.

The semi-structured interview questions, also used in the focus group session, were based upon the cardinal themes identified from the literature review (see **Appendix E**). Communication of the questions was tightly controlled and consistently replicated. Also, each of the participants received a briefing note prior to the interview providing them all with the same information and context for the questioning (**Appendix F**). This tight control of prior information and understanding was important for maintaining consistency of approach across all of the interviews and also mitigating the potential for researcher bias emerging in the questioning (Gummesson, 1991).

All interviews were recorded using audio equipment; this was to ensure that a true reflection of what was said would be constructed post-event, and so that transcriptions of the interviews could be produced for analysis. This additional independence for the data supports its validity in subsequent critical analysis and reflection (Flick, 1999). The audio transcriptions were cross-referenced with the research journal notes, recorded on individual face sheets for each respondent, taken by the researcher during the interview to identify emerging themes and codes.

Supporting the semi-structured interviews was the 'contextual observation' method (Yin, 1994; Sapsford & Jupp, 1996) which allows the observation of participants' behaviour and messages during the interview and discussions, and also wider organisational and cultural context of leadership. For this reason, all face to face interviews (except for two interviews conducted via video conferencing) were conducted on-site in the participants' place of work. Both semi-structured interviews and contextual observation account for the primary data collection within this research.

The Secondary data collection approach included the analysis of artefacts and documentation. These artefacts and documents provided an important aspect of the research process, as they represented the systemic, organisation-level intentions with the leadership development programmes.

Subsequently, using both the primary and secondary data sets, triangulation and content analysis was applied to the data to produce an in-depth, multi-perspective and balanced picture of the systemic effect of the leadership development processes. More details of this process are discuss in Step Six (Section 3.2.14).

There are certain ethical research considerations and protocols for a researcher when critically comparing their own views and those of the research subjects (May, 2001). There is potential for all manner of negative impacts, such as misrepresentation, misunderstanding, relational damage, sympathy and biased affiliation. However, the researcher and research subjects remained inviolate throughout the conduct of the research (Wilson & Vlosky, 1997). Therefore significant attention was given to confidentiality, informed consent, monitoring and control access of data; as well as the governance of data protection legislation (Blaikie, 2007).

3.2.12 Theory-building validity - Step Four: *Entering the Field*

During the case study data gathering phase, the researcher maintained extensive field notes and recorded emerging themes as they arose during the interviews. Reviewing the field notes against the audio files shortly after the interview event was also extremely effective in capturing emerging themes and constructs. The field notes were captured on a standard face sheet document, which had the

thematic case-study research questions mapped out for quick reference, and a fresh document was applied to each interview.

The first case study also acted as a pilot: for adjusting the thematic interview questions; in terms of manageable scope, efficacy in eliciting meaningful responses and data collection approaches. Also as to what types of artefacts and contextual observations were most desirable and expository. The process ran smoothly and the field notes, memos and patterns were apparent from the onset. Slight adjustments to the process was made, such as semantics within the research questions, or additional questions to explore different aspects of the theme, audio recording methods and scheduling and routine of reviewing and recording immediately after the interviews observations and ideas.

Also, by maintaining a flexible approach to data collection, the researcher was able to grasp an opportunistic data collection moment, such as, when the researcher was conducting an interview in the office of a case study, another potential interviewee fortuitously became available, and was then subsequently interviewed, over a lunch break, and included in the research.

3.2.13 Theory-building validity - Step Five: *Analysing Data*

There are multiple factors to consider in analysing data in this research study: namely, the utilisation of the case study method; that the study is qualitative methods-based; and, analysing socially constructivist phenomena. This section will focus on the *process* of analysing the data; however, the interaction between data analysis and these factors are continuously discussed throughout the chapter.

Miles and Huberman (1994) propose that data analysis is principally conducted at two levels when applied within the case study approach: *within-case* and *cross-case* analysis. Within-case analysis aims to establish a grounded sense of local reality, where data is collected in close proximity to a specific situation, and involves detailed write-ups for each site and situation. Cross-case analysis enables the observation and exploitation of processes and outcomes across multiple cases, and to understand in what way they are qualified by local conditions. This is done so that more sophisticated and complex descriptions, with more meaningful explanations, can emerge and therefore enhance comparability and generalizability (Miles & Huberman, 1994).

Analysing the case data against the analytical model - constructed in Part Three of this chapter - requires a well-defined process, so that the research endeavour is manageable, conclusive and internally and externally valid (Modell, 2009).

There are typically three stages in the process of data analysis (Miles & Huberman, 1994; Sarantakos, 1994). See **Table 3.6** for a comparative breakdown of these three steps. They can be summarised as essentially being: (1) reducing the data down into relevant sub-parts by a process of selecting or abstracting, simplifying and manipulating the data from transcriptions, field notes and audio recordings; (2) organising and compressing the data into formats that permits drawing conclusions and handling activity; (3) Interpreting the data using a variety of approaches (e.g. regularities, causal flows, propositions and pattern coding) to formulate conclusions.

Miles and Huberman (1994)		Sarantakos (1994)	
Stage	Process	**Stage**	Process
Data Reduction	Selecting, focusing, simplifying, abstracting and transforming data from transcripts, notes etc	**Data Reduction**	Manipulating, integrating, transforming data while they are presented and subsequently (audio, transcripts, notes etc)
Data Display	Assembly of information into organised formats that support conclusion drawing and action	**Data Organisation**	Accumulating findings around key themes and concepts, and categorising data for analysis
Conclusion drawing / Verification	Using a variety of analytical forms to explain meaning and draw conclusions, and subsequent verification	**Data Interpretation**	The application of analytical techniques in order to create rigorous conclusions and meaning

Table 3.6 - Three Steps of Data Analysis. Source: Author

The above process is iterative, in that there is a natural interaction between the whole as the research progresses. Particularly around the coding stages where the author would repeat the entire process, refining it specifically based on the emerging insights from the proceeding stage. In this sense, the process is cyclical, with iteration as the driving force. This cyclical aspect is essentially the verification process where conclusions are tested for plausibility, sturdiness and validity (Miles & Huberman, 1994).

Figure 3.6 demonstrates how the data analysis process is constructed and cyclical. It is important to note that the analysis is not merely done at the drawing conclusions phase, but is woven through-out the process, both during and after, data collection.

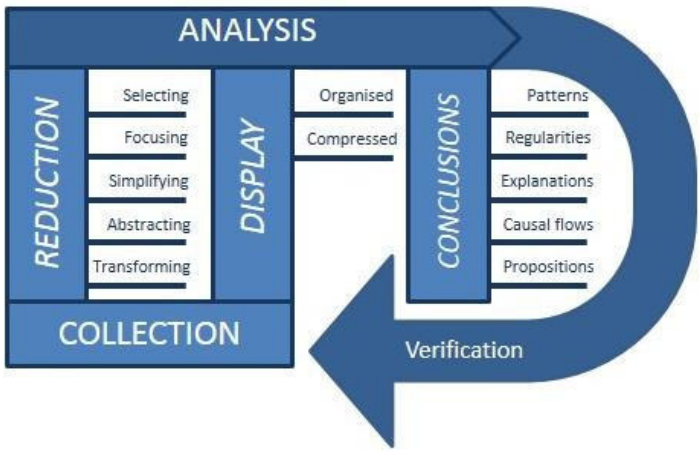

Figure 3.6 Three Steps of Data Analysis. Source: Author

To support the analysis process - specifically, coding approach and theory development - two approaches were considered: the use of sophisticated QDA software, or undertake the data reduction, display and drawing conclusions manually (alongside basic software). There was considerable debate as to the merits of both approaches. This will now be discussed.

A key consideration was the inexperience of the researcher at qualitative research. Novice qualitative researchers can easily become lost in the data analysis process (Richards, 2005; Papadopoulou, 2013). This can be compounded by an over-reliance on software support; where the process becomes mechanistic rather than supportive and functional (Richards, 2005). The intended purpose of coding can then become convoluted and misguiding (Richards, 2005). This issue was evident during the initial within-case analysis stage, where momentum became dangerous. Too fast can just generate volume and complexity, with diminishing returns with regards to meaning (Richards, 2005; Ritchie, 2010). This quickly became the case, and research progress stagnated. It is widely recognised that this problem becomes even more dangerous when software removed clerical limitations to building volumes of data. The sheer quantity generated the proverbial 'wood for the trees' syndrome.

Specialised software can also inhibit the researcher acquiring intimate knowledge of the data. Qualitative data should be read. Indeed, reading is key. This process requires little formality and can be done anywhere at any time; armed with a print out, notepad and voice recorder to capture tentative observations and thoughts (Richards, 2005). This intimacy with the data is essential, as language is contextual and highly variable. The same word can be used in multiple ways and be rooted in entirely different meaning, intentions and context. It takes meaningful enquiry and familiarity with the language to decipher this. This can only be achieved by spending time reading and reflecting on the data. Indeed, reflection is key to generating meaning.

This is not to detract from the clear benefits of utilising QDA software, such as its ability to handle large amounts of data, the ease at which you can recode the data and the ease of maintaining an audit trail (di Gregorio, 2006), rather to understand the trade-offs of hastily adopting its usage. It was clearly apparent that software can help the labelling and assimilation of data, just not the analytical. It required 'getting to know' the language and narratives to generate the labels. However, if anything, utilising software can encourage researchers to code without knowledge of analysis; apply sloppy coding, hidden behind sophisticated analysis; or under-analyse data using quick methods (di Gregorio, 2006). These issues were of patent concern to this research.

The balance between having an in-depth understanding of the data versus understanding specialised software functionality was a key tension in the early stages of defining the analysis process. The researcher resolved the tension by committing to focus on understanding intimately the data, without losing focus and time, building expertise in sophisticated QDA software utilisation, therefore, the researcher utilised existing software, with which he had expert capabilities - Microsoft Excel software - for data management and assisting in the coding processes, and relied upon the manual cycle of reviewing and revisiting transcript print outs, face sheet records, research journal and audio recordings, building deeper reflection and meaning. This option worked extremely well for the researcher, as it matched innate strengths, and mitigated weakness.

A patient commitment to focus and reflect on the data generated initial observations, which allowed taking off from the data, lightly and loosely, from those early harvested observations. This then led to opening up the data through interrogation; looking for what were the conditions, consequences, strategies and interactions within the data (Richards, 2005). This logging process was efficacious using Excel software (**Table 3.7**).

The opening up of the data led to data expansion, where clear linkages emerged. Those clear linkages led to emergent ideas, which were captured in annotations, memos and voice notes. These ideas were beyond mere observations and enquiries. Indeed, they were more than the data. It was from them that categories and models were generated, leading to coding of the data.

It was necessary at this stage for data reduction, in order to store meaningful information. This was done by making descriptions of what they are. Richards (2005) refers to this stage in qualitative research is actually being about data retention rather than purely data reduction. This differentiation describes entirely the approach used in this research. This involved learning from the data; to review and absorb it until there was an intimate understanding of the patterns and explanations. The purposive coding process was about gathering relevance about a topic together. Purposive in a sense

that coding should always have a purpose and not be viewed as an end in itself; which is frequently the trap of researchers utilising software analytical methods (Richards, 2005). For example, software-assisted auto-coding can trap the researcher by over zealously focusing on the function rather than interpretation during the process (Richards, 2005). In this research, the coding had to be manually fed into Excel software, and was used as a data- and coding-management tool, rather than coding-generating tool.

The adopted approach to coding and analysis was consistent with Eisenhardt's (1989) case study validity steps and the within-case and cross-case analysis approach. There were three types of coding utilised in this study: *Descriptive, Topic* and *Analytical* coding (Richards, 2005).

- *Descriptive Coding* is essentially recording information and attributes of the case (Miles & Huberman, 1994; Richards, 2005). Its purpose is to retain materials of interest and decide what they are about. This was done on paper using a face sheet for each case, and a follow-up electronic document summarising them all. This type of coding is essentially a storage process, retaining relevant portions of data regarding the research questions. The manual approach allowed the researcher to focus on retaining attributes that were only relevant and to avoid the unnecessary build-up of excess information. An indication of the sort of descriptive coding used is found in **Table 3.7**.

- *Topic Coding* is essentially labelling passages that relate to relevant topics (Richards, 2005). This process was continuous in the data collection and analysis phases, as it grouped relevant passages and observations to the research questions and co-located them 'where they belong' for subsequent analysis. Patterns within the data, within-case and cross-case, as well as triangulation, were explored during this coding process, and interpreted further under analytical coding. Labelling short codes were applied as coding was done by hand (e.g. "ELT-001-D-2.1" – see **Table 3.7**). The researcher attempted to engage in an interpretative process whilst conducting this coding process in order to avoid the 'coding trap'. The approach to this form of coding can be captured in the question: "*What is this about?*" (Richards, 2005). An indication of topic coding is found in **Table 3.7**.

- *Analytical Coding* is about generating categories, leading to theory-building (Miles & Huberman, 1994; Richards, 2005). This form of coding was markedly different to the other two, in that it focused entirely on interpretation and reflection on meaning. It was not treated as a sequential process, but was iterative throughout the process, where meaningful reflections occurred, the appropriate analytical codes were created. As meanings in context

occurred, the researcher created categories that reflected the emerging ideas. Indeed, perhaps the greatest amount of time was spent in this form of coding during this research, as prolonged periods of reflection on each transcript were patiently maintained throughout the process. Categories were defined and re-defined several times during the data analysis process as emerging meaning generated a fuller representation of the phenomena in question. Key to progress in analytical coding was flexibility of mind in tirelessly generating evolving ideas and questions. It was felt this process was supported by the flexibility of retaining hard copies of the data materials and coding materials. Analytical coding seeks to ask the following two questions: "*Why is it interesting?*" and "*why am I interested in that?*" (Richards, 2005). An example of analytical coding used in this research is in **Table 3.7**.

Table 3.7 is an example of the three forms of coding being applied to a passage from a transcript. The table shows the first column has a brief *descriptive* code linking it to the research questions. The second column shows the labels of the respective *topics* and what the data is about (these topics relate to the cardinal themes of the research). The third column contains the *analytical* categories and the generation of ideas.

See **Appendix G** for examples from each of the coding worksheets for both case studies and validation study.

		TYPES OF CODING			
INTERVIEWEE INITIALS	**ANONYM**	**DESCRIPTIVE** *See interview face sheets	**TOPIC (THEME)**	**ANALYTICAL**	**CODING DESIGNATION**
DH	**Energy Leadership Trainer (ELT)**	*"…aiming to…" [p4]*	Delivery	Instructor Identity ambiguity	**ELT-012-A-1.2/1.3/2.1**
		"…all have had senior roles" [p4]	Delivery	Post-future-role development	**ELT-013-A-1.2/2.2/3.1**
		"…that bit more strategically focused" [p4]	Delivery	Purpose fail (strategy link)	**ELT-014-A-1.2/1.4/2.1/2.2/2.3/3.1/3.2**
		"…enginneer, HR, publishing, retail…" [p5]	Delivery	Mismatched experience (LD team)	**ELT-015-A-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3**
		"…ten other international companies" [p5]	Delivery	Globalisation cultural development	**ELT-016-A-1.2/1.3/2.2/3.1/3.2/3.3**
		"…don't appear to be that well prepared" [p5]	Delivery	Not fit-for-purpose	**ELT-017-A-1.5/2.1/2.4**
		"…does it add value" [p6]	Contextualisation	Myopia (egoistic/strategy/values)	**ELT-018-B-2.2**
		"...value of course not seen" [p6]	Contextualisation	Myopia (egoistic/strategy/values)	**ELT-019-B-2.2**
		"...getting out the weeds" [p6]	Contextualisation	Myopia (egoistic/strategy/values)	**ELT-020-B-2.2**
		"...not equipped..." [p6]	Contextualisation	Insufficient contextualisation	**ELT-021-B-1.2/1.4/2.4**
		"…holding their hand" [p6]	Contextualisation	Challenging Immaturity	**ELT-022-B-1.4/2.2/3.1/3.2/3.3**
		"..probably through conversations" [p7]	Contextualisation	Merely contextualisation through conversation	**ELT-023-B-1.2/2.1/3.1**
		"…career development" [p7]	Contextualisation	Egoistic myopia	**ELT-024-B-1.3/1.4/2.1/2.2/2.3/2.4/3.1/3.2**
		"…different methods…" [p7]	Performance	Unstructured feedback	**ELT-025-C-1.2/1.3/1.4**

Table 3.7 - Example of Assigned Three Coding Forms from Transcript. Source: Author

A breakdown of the constituent parts of the "coding designation" (last column in **Table 3.7**) is as follows:

- Data source (interviewee *"ELT"*);
- Chronological order of the observation in the transcript (*"012"*)
- Relation to the respective cardinal theme of leadership development / element of the analytical framework (*"A", "B"* etc)
    A. Delivery
    B. Contextualisation
    C. Performance
    D. Impact
    E. Values
- Relation to the respective sub-categorisation of the systemic leadership development definition (*"1.2/1.3"/"3.1" etc*). See categories and sub-categories below in **Table 3.8**.

Systemic Leadership Development Definition		
Categories and Sub-Categories		
1. Collective Synergies	**2.Organisational Development**	**3.Social Structures and Processes**
1.1 Team building 1.2 Forging and maintaining commitments 1.3 Trust, cooperation, goodwill and reciprocity 1.4 Feedback and challenge **1.5** Social awareness	2.1 Setting direction and alignment 2.2 Social and organisational imperatives 2.3 Cultural development 2.4 Social awareness	3.1 Integration with social and network systems 3.2 Fostering cooperation, coordination and networks 3.3 Social awareness

Table 3.8 - Systemic Leadership Development Definition Sub-categories Coding. Source: Author

The coding designation thus demonstrates an inter-relativity and inclusivity between the data source, cardinal themes and the systemic definition in each and every observation.

The coding approach in this research was a continuous process, in that it occurs throughout the project, iteratively generating categories and revisiting them to check development and re-

categorisation, and to create new categories until the last stages of the project, as intimacy with the data increases and a greater sense of meaning and understanding emerges from the within-case and cross-case analysis. A disposition for constant analysis and project interpretation is fundamental to generating depth, rather than breadth, of meaning from the analysis.

As themes and concepts emerged from the analytical coding categories, modelling was used to demonstrate theoretical ideas and aid the development of those concepts. This provided focus and reconciliation with regards to synergistic categorisation evolution.

A reliability test was regularly carried out during the analysis process, by printing off fresh unmarked hard copies of the transcripts and coding them without any reference to the previous coded version of the transcript (Miles & Huberman, 1994; Richards, 2005). The coding from the two transcripts was then compared for consistencies and different perspectives. This process progressed the research towards specific, consistent and reliable ideas and theories.

Data triangulation was similarly incorporated into data analysis, as it was recognised that a between-method approach generates a more holistic assessment of organisational-level issues, than mere reliance on a single method (Paul, 1996; Kane & O'Reilly-de Brún, 2001). The triangulation comprised of interview analyses, contextual observation in case environments and artefactual organisational data (Paul, 1996; Silverman, 2000). The construction of categories and concepts was triangulated across the findings of these independent data sources. This process provided validity checks, across Yin's (1994) four forms of validity checks, against the interviewees' narratives. The inter-relativity between the different methods of data triangulation and where validated patterns emerge and match is demonstrated in the following **Figure 3.7**.

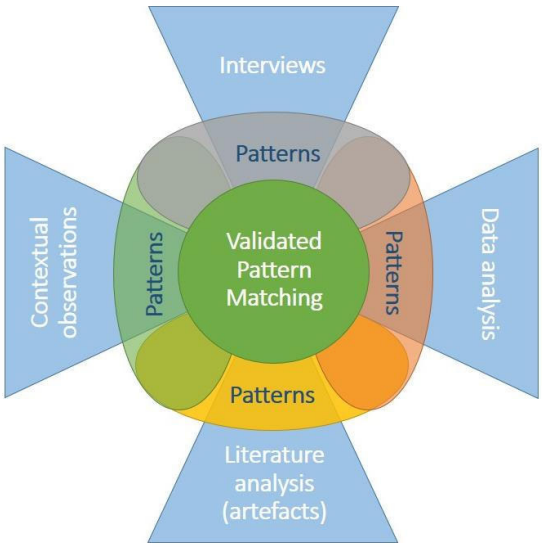

Figure 3.7 - Data Triangulation. Source: Adapted from Kane & O'Reilly-De Brun (2001)

Pattern-matching (Ritchie & Lewis, 2004) was utilised during the coding processes of the data analysis, by comparing the empirically-generated triangulated findings and patterns, and by verifying these by matching them against respective findings and predicted patterns, as they emerged. Through matching observed and predicted patterns this achieved significant internal validation of the findings (Yin, 1998). Pattern-matching was an important process, as it incorporated prior experience - of the researcher and participants - and logic constructs to specify what might be expected to exist. The analysis then iteratively compares the actual findings with expectations; and when they do not match, either the expectations are reviewed and adjust, or a deeper explanation is sought to explain unexpected phenomena.

3.2.14 Theory-building validity - Step Six: *Shaping Hypotheses*

Shaping hypotheses relied on the rigorous application, and attention to detail, of the previous data analysis stage.

For a detailed explanation on how hypotheses were shaped and validated in this research, see Part Three of this chapter where the step is discussed within the analytical framework and how hypotheses and theories emerge from its application.

3.2.15 Theory-building validity - Step Seven: *Enfolding Literature*

The literature review had clearly identified established knowledge in the field of leadership development, with the identification of cardinal themes and the need for systemic view of leadership development, and those were critically analysed through the data. The literature was subsequently reviewed again as research findings disclosed key themes, which required further specific inquiry. This second review at times revealed different perspectives with the existing literature. Theoretical issues that were not perceived to be problematic showed signs of being problematic in the research findings, therefore a new critical consideration of extant assumptions was promoted. Essentially this enfolding phase presents dialectics of existing explanations and assumptions and shows contentions within assumptions, which might be contentious and tree-shaking within the domain.

3.2.16 Theory-building validity - Step Eight: *Reaching Closure*

The process of reaching closure, in terms of this thesis, is complete when factors of influence have been evidentially identified in relation to the cardinal themes and the systemic leadership development definition, using the analytical framework as a testing model. The output will provide greater knowledge, in a socially constructivist sense, and understanding of how certain key variables

influence complex multifarious processes like leadership development, for more efficacious future theoretic and pragmatic application and development.

3.2.17 Description of the Cases

3.2.17.1 Introducing Case Study A: Mid-Level Energy leadership development Programme

Case study A is a mid-level leadership development programme within a British multinational energy company. The organisation has offices in 40 countries worldwide and a work-force of approximately 29,000 employees. The programme is part of the learning and development portfolio within the organisation's training highly regarded "Leadership Academy".

The leadership development programme lasts for approximately 13-14 months and comprises a recurrent series of intense workshops, each a week long, along with team working activities and cumulative action learning sets. It is a closed course, available only to participating leaders within the organisation. Participants conduct the programme whilst concurrently maintaining regular employment within the business. The programme aims to equip participants with the skills, knowledge and experiences necessary for a senior management role. It is stated, this is achieved through accelerated, experiential development. Attendance on the programme is by invitation only. The selection criteria is based on those in middle management roles deemed suitable for accelerated development to next, or above, levels of management.

Delivery of the programme is supported by four external third-party training and development service providers.

The aims and outcomes for the programme are to develop the capabilities contained within the business' core leadership behaviours. These have been defined as:

- Have the management skills necessary to deliver results for their various stakeholders
- Be able to operate more effectively across different cultures
- Be better equipped to interact with top management
- Have developed the skills necessary to operate effectively in a virtual team
- Better understand the global business and strategy
- Have improved leadership capability as defined in the business leadership behaviours

The programme structure and themes are demonstrated in **Figure 3.8**.

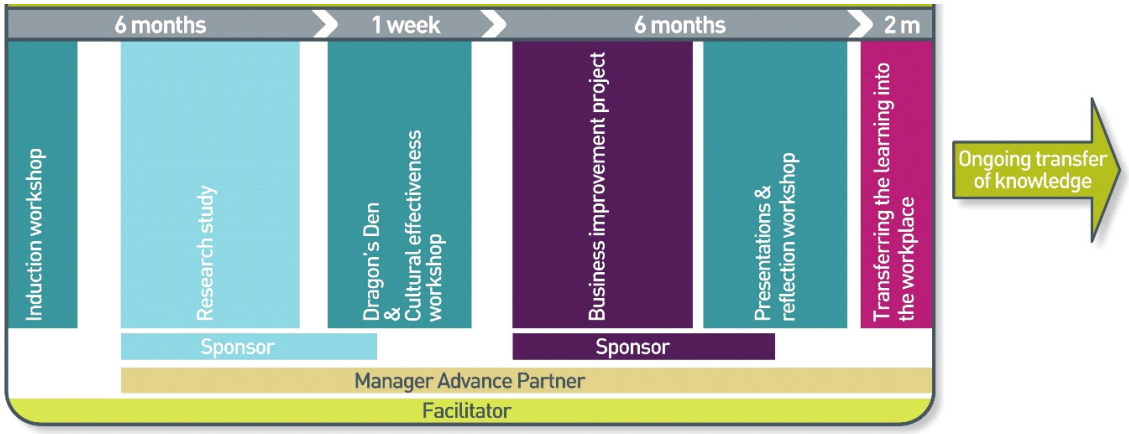

Figure 3.8. Energy Mid-level Leadership Development Programme Structure. Source: Case

The main design elements for the programme are tailored developmental activities;

- work-based business improvement projects;
- ongoing support of a mentor/coach;
- peer learning through team based activities;
- exposure to opportunities not normally available;
- increased visibility and networking opportunities.

The leadership programme was well-established and had been running for four years prior to observation with this research. The programme was perceived as being a key catalyst for generating competent leadership within the global business.

The case study organisation was closely affiliated to Aberdeen Business School and gracious in their allowance of access to management, artefacts and previous programme participants; as well flexibility with regards to the researcher returning to the case for further enquiry and clarification, where necessary. Despite time and availability limitations, the researcher was able to build a relatively good level of knowledge and understanding of the programme, wider organisation and key stakeholders.

3.2.17.1.1 Conduct of the Case

This case study was conducted during May-June 2014. It was undertaken with the consent of the Global HR Director and the leadership programme manager.

3.2.17.1.2 Semi-structured Interviews

Semi-structured interviews were conducted utilising *a priori* constructs (i.e. research problem and questions, five cardinal themes, systemic leadership development definition and conceptual analytical model) as well as multiple perspectives (generating socially constructed interpretations), covering board-level programme sponsor, programme manager, training facilitator and multiple programme participants. The interviews aimed at generating multimodal, situated descriptions of the learning situation, where meaning could be constructed with regards to various aspects of practice within the knowledge and experience of the interviewee.

In total, ten people were interviewed, nine individually face-to-face, at their business premise, and one via video-conferencing. Of the ten interviewees, eight of them were male and two female. One female was the Programme Manager (EPM) and the other female was a Programme Participant (EPP02). The duration of the interviews were between 60 and 120 minutes. Participants were selected unitarily by the case study sponsor, depending on availability. Prior to the interviews every participant was sent an identical briefing document (**Appendix F**), this was to focus their thoughts prior to the interview and also to explicitly state the purpose and context for the analysis. The interview questions were the same across all interviews and covered the cardinal thematic researcher's questions (see **Appendix E**).

The interviewees represented four levels within the programme and are listed in **Table 3.9**.

Position	Code Designations	Number of Interviewees
Programme Owner (Global HR Director)	EPO	1
Programme Manager (Training Manager)	EPM	1
Programme Leadership Trainer (External Consultant)	ELT	1
Programme Participants / Students (Global managers)	EPP01-07	7
TOTAL		**10**

Table 3.9 - Interviewees by position (Energy Case). Source: Author

All interviews were digitally recorded on at least two sources and later transcribed. During the interviews the researcher utilised face sheets for each interviewer with the research questions outlined and blank spaces provided for observations and annotations. This method proved to be particular useful in identifying core messages and themes from the interviewees. Subsequent to the interviews the researcher generated excel spreadsheets to collate the transcripts, researcher's notes and coding processes.

3.2.17.1.3 Observations

In addition to the semi-structured interviews, the researcher attended (strictly as a non-participating member):

- several internal meetings regarding the global training academy; including discussions on areas for improvement (November 2013; June 2014)
- an internal strategy presentation from senior management (August 2014)

Around these events informal discussions with other senior managers of the business regarding leadership behaviours, corporate values and future direction of the business. Observation notes were taken and recorded in the research diary.

3.2.17.1.4 Artefacts

Supporting literature and materials were gathered by the researcher, including course content materials, internal literature on leadership behaviours and corporate values, and strategic documentation outlining future direction of the global business.

Where permissible, notes from observations and artefacts were included in the data analysis.

3.2.17.2 Introducing Case Study B: Mid-Level Military leadership development Programme

Case study B is a mid-level leadership development programme within the British Army. The British Army has bases all over the world, spanning 25 countries globally, with a workforce of approximately 100,000 employees. Of the total figure approximately 10,000 are mid-level leaders; with 85 percent[3] of those mid-level leaders having conducted the case study leadership development programme. The programme is part of the flag ship leadership academy for the British Army, which delivers a broad portfolio of learning and development interventions for mid-level leaders. That portfolio consists of up to thirteen mid-level leadership developmental interventions. On average, most mid-level leaders will conduct the vast majority of those interventions; with the possible exception of two or three of those offerings, which are specialist and exclusive.

The leadership development programme is 48-weeks long and comprises of three 16-week-long terms. The programme is fully residential and located in South of England at purpose-built facilities. The students are seconded full-time, from their respective branches of the army, to the academy during

[3] 15% represents Late-entry commissioned officers (who conduct a shortened version of the programme), non-operational staff and foreign-service seconded staff.

their participation in the programme and have no further responsibilities beyond attendance. Ninety percent of the participants are university graduates. Prior to attendance on the programme there is a robust selection process, which involves an initial interview with senior representatives of the programme, and a three-day long selection course (based on the year-long programme); after which only those deemed to be of sufficiently high calibre will progress to the leadership development programme. The selection process is extremely challenging; manifest in the 55 percent success rate for participants going through selection.

The programme is designed around basic infantry soldiering, providing a common context for leadership development, where participants are expected to master the core essentials. Using this common context, leaders are expected to develop courage and willpower, with the temperament for decisive action in difficult and dangerous circumstances. The philosophy is one of challenging performance in challenging scenario-based environments. The core purpose of the programme is to develop leadership character, intellect and professional skills; hinged entirely on the corporate values of selfless commitment, respect for others, loyalty, integrity, discipline and courage. The programme proposes to foster attitudes to integrity, selflessness and loyalty which set leaders apart from others, and to teach leaders how to think and communicate as effective leaders and to foster a deep interest and care for the individual, as well as to encourage the analysis of strategic and war studies as a foundation to military thought and wisdom.

3.2.17.2.1 Conduct of the Case

This case study was conducted during November-December 2014. It was undertaken with the consent of the Academy Director / Commandant – a British Army officer ranking Major-General (2-star) - and the leadership programme manager.

3.2.17.2.2 Semi-structured Interviews

Like Case Study A, semi-structured interviews were conducted utilising *a priori* constructs (i.e. research problem and questions, cardinal themes, systemic leadership development definition and conceptual analytical model) as well as multiple organisational perspectives (generating socially constructed interpretations), covering executive programme sponsor, programme manager, trainer-facilitator and multiple programme participants. The interviews aimed at generating multimodal situated descriptions of the learning situation, where meaning could be constructed with regards to various aspects of practice within the knowledge and experience of the interviewee.

In total, eleven people were interviewed, individually face-to-face, at the leadership academy premises. Of the eleven interviewees, seven were male and four female. The four females were all

Programme Participants (MPP02/03/06/07). The duration of the interviews were between 45 and 90 minutes. Compared to Case Study A, slightly less time was available with each participant due to the training schedule demands of the programme. Participants were selected unitarily by the case study sponsor, depending on availability. Prior to the interviews every participant was given an identical briefing document (**Appendix F**), this was to focus their thoughts prior to the interview and also to explicitly state the purpose and context for the analysis. The interview questions were the same across all interviews and covered the five thematic research questions (see **Appendix E**).

The interviewees represented four levels within the programme and are listed in **Table 3.10**.

Position	Code Designations	Number of Interviewees
Programme Owner (Academy Director / Commandant)	MPO	1
Programme Manager (Training Manager)	MPM	1
Programme Leadership Trainer (Internal Instructor)	MLT	1
Programme Participants / Students (managers)	MPP01-08	8
TOTAL		**11**

Table 3.10 - Interviewees by Position (Military Case). Source: author

Like Case Study A, each of the interviews was digitally recorded on at least two sources and later transcribed. During the interviews the researcher utilised face sheets for each interviewer with the research questions outlined and blank spaces provided for observations and annotations. This method proved to be particular useful in identifying core messages and themes from the interviewees; allowing data analysis to occur from the onset of the research – as real-time observations assist identifying levels of significance in the data. Subsequent to the interviews the researcher generated excel spreadsheets to collate the transcripts, researcher's notes and coding processes. Those spreadsheets greatly assisted in coding and reviewing the data: such as searching key words and themes.

3.2.17.2.3 Observations

In addition to the semi-structured interviews, the researcher attended (strictly as a non-participating member):

- An internal lessons-learned After Action Review (AAR) of the programme; hosted by the programme manager (December 2014)

- An After Action Review (AAR) of a scenario-based exercise with the leadership trainers and a cohort of 30 programme participants (December 2014)

Around these events were informal discussions with other senior managers of the Army and the Academy regarding leadership behaviours, corporate values and future direction of the Academy and British Army. Observation notes were taken and recorded in the research diary.

3.2.17.2.4 Artefacts

Large amounts of supporting literature and materials were gathered by the researcher, including course content materials, internal literature on leadership behaviours and organisational values, and strategic documentation outlining future direction of the British Army.

Where permissible and relevant notes from observations and artefacts were included in the within-case data analysis.

3.2.17.3 Introducing the Validation Study

The validation study was based on data provided in a facilitated focus group, conducted in Aberdeen, February 2015. The study was conducted with three former military mid-level leaders, all of whom had completed the same mid-level leadership programme analysed in Case Study B, and all now mid-to-senior leaders within the oil and gas industry, who have also previously (subsequent to leaving the military) conducted mid-level energy sector leadership development programmes across various organisations.

The purpose of the validation study was to:

- Provide an appropriate extraneous and objective perspective to the data analysis
- Provide a comparative element to the analysis by using cross-case experiences of programme participants
- Validate the veracity of the case studies analyses, via triangulation, during cross-case analysis

3.2.17.3.1 Conduct of the Focus Group Study

As with the sector case studies, the focus group was conducted utilising *a priori* constructs (i.e. research problem and questions, cardinal themes of inquiry, systemic leadership development definition and the Fi model) as well as multiple experiential perspectives of participants. The focus group aimed to generate multimodal descriptions of the two learning experiences, particularly around

comparative analysis, where meaning could be constructed with regards to various aspects of comparative practice within the knowledge and experience of the focus group participants.

The three participants, all male[4], took part in the focus group were held at Aberdeen Business School, February 2015. The duration of the focus group was approximately 60 minutes. Prior to the focus group each participant was sent an identical briefing document (**Appendix F**), attached to an email, which asked them to consider their personal experiences of both the military and energy sector mid-level leadership development programmes, in relation to the cardinal themes. This was to focus their thoughts prior to the focus group and also to explicitly state the purpose and context for the analysis. The interviewer/researcher questions were similar to the case study questions, covering the cardinal themes, but with the added perspective of asking the respondent to make comparative assessments of what was done well or poorly, in their opinion, within either programme experiences (see **Appendix E**). Details of the three focus group participants are listed in **Table 3.11**.

Current Position	Code Designations	Details of relevant leadership development experiences
Validation Leader 01 - "AP" (Mid-level manager at global oil and gas services company)	VL01	Former British Army officer (in the Armoured Corps, heavy tank regiment), conducted the military case study leadership development programme in 1994; subsequently transitioned into a career in the subsea oil and gas services industry. In 2004 he conducted a significant mid-level leadership programme, 6-weeks over a calendar year, within a global oil services company, based in Aberdeen, UK.
Validation Leader 02 - "MR" (Senior-level manager at global oil and gas exploration and production company)	VL02	Former British Army officer (in the Royal Corps of Engineers), conducted the military case study leadership development programme in 1998; also, subsequently transitioned into a career in oil and gas production and exploration industry, where he is currently a senior-level leader. In 2008, he conducted mid-level leadership development programme, 14-weeks over two calendar years, in his current global production company employer, based in Aberdeen, UK.
Validation Leader 03 - "JS" (Mid-level manager at global oil and gas exploration and production company)	VL03	Former British Army officer (in the Air Corps, as a helicopter pilot), conducted the military case study leadership development programme in 2007; also, subsequently transitioned into oil and gas exploration and production industry, where he is currently a mid-level leader. He recently in 2012 conducted a mid-level leadership development programme, 4-weeks long, with his current global production company employer, based in London, UK.

Table 3.11 - Focus Group Participants. Source: author

[4] There were no female respondents to the calls for participation in the study. And only one female was identified in an additional search for suitable participants, but she was unavailable for the available focus group dates.

As with both case studies, the discussion was digitally recorded on at least two sources and later transcribed. During the interviews the researcher utilised face sheets with the researchers questions outlined and blank spaces provided for observations and annotations. As with the case studies, this method proved very useful in identifying core messages and themes from the interviewees; allowing data analysis to occur from the onset of the research – as real-time observations assisted in identifying levels of significance in the data (such as respondents' voice tonation, body language and collective agreement with other group members). The researcher generated excel spreadsheets to collate the transcripts, researcher's notes and coding processes. Those spreadsheets greatly assisted in coding and reviewing the data: such as searching key words and themes and identifying potential systemic leadership development linkages.

3.2.17.3.2 Artefacts

Limited artefacts were utilised in the focus group. The artefacts available for Case Study B were relevant, as the essentials of that programme have remained relatively unchanged across the time span of 1994 to 2015. Thus, where permissible and relevant, notes from observations and artefacts, such as websites and internet articles, were included in the within-case analysis.

PART THREE – DEVELOPING AN ANALYTICAL FRAMEWORK

3.3 Introduction to the Conceptual Analytical Framework

Chapters Two identified a need for a greater social-contextual orientation in leadership development, through systemic leadership development. It also identified cardinal themes of leadership development. Part One of this chapter situated this phenomena within a social constructivist paradigm and led towards a qualitative methodology utilising a case study approach in Part Two. Part Three outlines the analytical framework applied for evaluating how each of the cardinal themes influence systemic leadership development.

The analytical framework provides organisation and structure to how the research phenomena is viewed, why it is being viewed that way, and the processes and activities involved. It also incorporates influences from other researchers who have espoused similar ideas and research.

The framework logically and accumulatively follows on from the preceding products of the research journey and supports the sense-making and theory building aspects of the study. This progression, indeed synthesis, should provide a specific taxonomy for critical analysis. Specific in the sense that particular phenomenon are the focus of attention and theoretical extrapolation.

3.3.1 Theory-building: Making Theoretic Contributions with an Analytical Framework

Prior to describing the analytical framework, a key factor for this research is understanding what sort of theoretic contribution is practicable and appropriate within leadership development studies.

Within the discipline of leadership development, theory building should not be an alien, abstract intellectual exercise, with little porosity into industry practices; but should have pragmatic relevancy and applicability at its very core (Howard & Wellins, 2008; Day, 2011; Alvesson, 2013). Indeed this has been one of the chief charges against meaningful progress in leadership studies (Day, 2011; Mumford, 2011). Kilduff (2006) observed "*the route to good theory leads not through gaps in literature but through an engagement with problems in the world*" (p. 252). Corley and Gioia (2011) also stated we must "*begin to account for relevance to practice in a much more substantive manner*" (p.27). These observations justify and validate the research problem outlined in Chapter One.

Alvesson (2013) recognises this issue, promoting that theoretical contributions must go beyond just academia, but be "*interesting and relevant for organisational life*" (p.79). That commitment to being interesting and relevant must be manifest in making a difference to the understanding of the targeted phenomena. In essence, bringing research back to a pragmatic application; away from esoteric topics, and often overly complex, isolated methodological debates regarding marginal issues (Alvesson, 2013).

The relevance of the research then becomes wider and less parochial to merely sub-tribe academic groups. Alvesson (2013) states this shifting emphasis as:

> "*…to go from instrumental, inward-looking 'adding to the literature' to thinking more broadly about 'having something meaningful to say' as a key concern*" (pg. 83)

The contribution and clear message must be interesting, important and valuable to a wider audience, both theory and praxis, not just technocrats within academia. Within leadership studies, closed community dialogues amongst dispersed academics must be a thing of the past, and new theoretic contributions must be opened up to the real world, where greater influence can be exerted (Corley & Gioia, 2011; Day, 2011).

Good examples of theory-to-praxis focus in organisational studies are extraordinary, but can be found in Kunda (1992) and Watson (1994). These examples demonstrate the need to focus on extremely important, broad topics of economic, social and individual concern; are well-written (notably free from excessive academic language), personal and engaging; strong moral and critical commitment; well-researched and covering a broad terrain with a large number of rich illustrations; and, yet be insightful, with creative interpretations (Alvesson, 2013).

This research study diligently endorses these factors and contribution-intent throughout the research design, gathering and analysis phases; and supports the zeitgeist of theoretical contributions that have a commitment to both theoretic and pragmatic usefulness. It is perhaps this usefulness that is key to meaningful theorising in the leadership domain. Indeed, Mintzberg (2005) proposed it was more important to contribute theories that were more useful than necessarily truthful.

The kind of theory this research generates is a hybrid of narrative and enlightenment (Di Maggio, 1995). In that, it involves testing narratives for plausibility and generating hypotheses and theories which maintain a small distances between them (Di Maggio, 1995). It also focuses on exciting insights, where intuition supports the production of surprising syllogisms (Di Maggio, 1995). For example, in this research study, there is found paradoxical datum, such as the dialectics of personal versus collective leadership development; individual needs versus organisational needs; hints of beneficial indoctrination and institutionalisation; and the uncomfortable nature of challenge in developmental feedback with regards to future leadership behaviours.

Another fundamental feature of this research is that theory construction is intrinsically synergistic with social constructivism. In this way, theory is a process of appropriation by resonance, rather than by reason and dictation. Theory is created by the readers as well as by the researcher, and then re-constructed in reality by the authors who employ it (Di Maggio, 1995). This appropriation is supported

by turning theories into slogans (Di Maggio, 1995), which constructs attractive forms, whereby the reader and author might take away ideas and fit them into pre-existing schemas and modes (Fleck, 1979). Consequently, theory promulgation might be indirect and circumstantial, yet, nonetheless more efficacious (Di Maggio, 1995). Examples of such slogans in this research are *Superhero Trainers, Leaders with Heart* and *Make Context King*.

For these reasons, theory construction and reception relies on more than merely its reductive potential, but is an evolving construct, which is carried by resonance to subsequent "*brilliant expositors who can turn muddled theories into canonical masterpieces*" (Di Maggio, 1995. p. 365). Thus, vitally, theories are socially constructed after they are written, and depend entirely on how good people are at picking up these ideas and making them work in theory and practice. In this way, theory construction within leadership development studies, is a cooperative odyssey between researcher, reader and author.

Another significant reconciliation for this research is clarifying what is meant by theory, and theoretic contributions. This is vital in making significant contributions to understanding across the field. As outlined in Part One of this chapter, social constructivism seeks not to make clumsy generalisations, rather constructivist theory contributes to practice indirectly; withdrawing from offering direct practical advice. Rather critiques are offered which might direct future applications like suggestive framing. Thus, theories must not make claims of truths or universal applicability.

Another key factor for this research is the nature of the symbiotic connection between theory and method. Maanen et al., (2007) identify that organisational and management research should synergise theory and method; they should not be regarded – and have not been in this research – as separate considerations, rather are tightly inter-related. By creating a condensed theory-method relationship, they are mutually supportive in creating rigorous propositions, by conceptualising theory and utilising method to move 'speculation' into 'empirically demonstrable' (Maanen et al., 2007).

Indeed, Maanen et al, (2007) proposed that in organisational studies, where it is social structures and processes that are being critiqued, theory-building cannot be a product of merely clear methodological application, but relies on cognitive processes: specifically, the conceptual theorising of the researcher. This deduction supports the phenomenological, social constructivist view of the research phenomena, where theories cannot be reduced to explanation via positivistic verification. Indeed, the cognitive process may suggest plausible relationships and causal connections which may not even be seen or comprehended in the data (Maanen et al., 2007).

Essentially, this form of empirical study produces the type of data which can be successfully applied to the process of theorising; allowing a study to adopt a cognitive and sense-making nature, where meaning develops over time (Bailyn, 1977; Weick, 1989, 1995; Maanen et al., 2007). Maanen et al., (2007) show that this tractability between the conceptual (data) and empirical (data) generates a logic of discovery, rather than a logic of validation; one of understanding rather than explanation. This cognitive focus is more conducive to a socially constructed phenomenological study.

Subsequently, theoretic contributions from this cognition-understanding process, when applied to this research study, are considerable in that they synthesise recent advances into fresh new thinking; promote a need for new theories, in given areas, by identifying novel theoretical solutions for theoretical problems; and significantly challenge or request clarification of existing theories and concepts.

3.3.2 Analytical Framework: Factors of Influence (Fi) Model and Comparative Analysis

Devising a framework for analysing the research phenomena must provide conceptual linkages from the research problem, through the key themes of analysis and how they relate to systemic leadership development, to what impact those themes have on developing social capital. Specifically, data analysis must look to provide empirical and conceptual insight and deeper understanding of which factors influence efficacious systemic leadership development.

It was identified that the core phenomenological interaction within the analytical framework was the way in which the cardinal thematic elements relate to the systemic leadership development concept. This is demonstrated in **Figure 3.9** below.

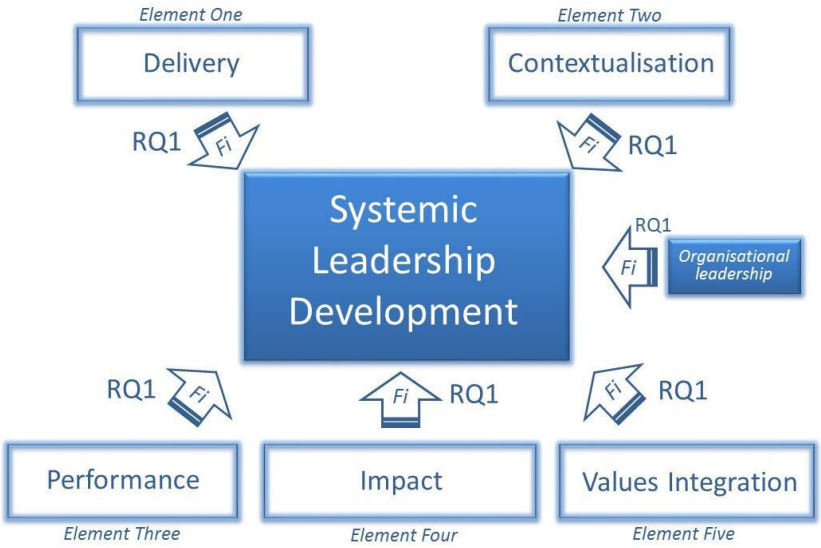

Figure 3.9 - Factors of Influence Model. Source: Author

The five elements (cardinal themes) relate to the systemic concept via Research Question One (discussed in Chapter One):

> RQ1. *Systemic leadership development is influenced by which factors, across the cardinal themes of inquiry?*

As discussed in Chapter One, it was recognised that looking at 'organisational leadership' would provide additional extraneous contextual perspectives for systemic factors, beyond the leadership development programmes. Therefore, this additional interaction is included in **Figure 3.9**.

The inferential interaction that exists between the five elements and the systemic concept is analytically viewed as *factors of influence*.

Analytical models utilising *factors of influence* are well established in qualitative research. Particularly Miles and Huberman (1994) where they have demonstrated their applicability and importance within the qualitative domain, as well as specifically the case study methodology.

Ritchie (2010) utilised factors of influence within his organisational learning conceptual framework, where catalysts and inhibitors were used to critically analyse causal relationships across three case study organisations. Although that particular study utilised a critical realist paradigm, the qualitative nature of the case study analysis lends considerable applicability to this current research thesis.

There are several relevant examples of analysing factors of influence within qualitative research, such as Noe and Wilk's (1993) investigation into factors that influence employees' participation in development activities; Reich and Benbasat's (2000) analysis of factors that influence social alignment between business and IT objectives; Hinze and Gambatese's (2003) review of factors that influence safety performance; and Holsapple and Joshi's (2000) investigation into factors that influence knowledge management within organisations.

Within these studies, there was a range of conceptual models for analysing the research questions. Hinze and Gambatese (2003) sought to identify factors that *positively* affecting key performance variables, like worker turnover, drug testing and incentive programs. Causal models were employed to demonstrate causes for positive influence. Reich and Benbasat's (2000) developed a theoretical research model identifying four factors of potential influence alignment, using a standard comparative causal effects model, measuring short- and long-term alignment influence. Noe and Wilk (1993) utilised a causal conceptual model for measuring the factors of influence, relating to *antecedents, mediators* and *outcomes* variables. The use of outcomes within the causal framework is a common concept, demonstrated and developed by Miles and Huberman (1994).

These causal analytical approaches are consistent with Miles and Huberman (1994) Within- and Cross-case qualitative analysis methods. Indeed, this research also proposes a model consistent with Miles and Huberman's (1994) case-orientated and variable-orientated strategies for case study analysis.

There are also considerable reasons to believe that wider research about learning theories and developmental phenomena - where factors of influence have played an intrinsic part in the conceptual model - such as Crossan et al. (1999) identifying factors affecting stocks and flows of learning; March and Olsen's (1975) factors impacting cycle of choice; and Daft and Weick's (1984) factors impacting organisations as interpretation systems - all provide adequate precedence to the efficacy of applying inferential analysis to a 'factors' approach.

Within leadership development research, factors which have been observed to affect leadership development are contained within the table below (**Table 3.12**). These demonstrate the potential array of phenomena which have been conceptually and empirically shown to influence efficacious leadership development.

Factor of Influence	**Author(s)**	**Comments**
Feedback	Day, 2011; Avolio, 2005, 2007; Hernez-Broome & Hughes, 2004; Bandura, 1997; Cacioppe & Albrecht, 2000	Positive feedback has been shown to generate reinforcement motivation for repeated future performance; and that negative feedback can also have a positive catalytic effect as well as a negative effect
Ability to learn from experience	Kouzes & Posner, 2002	Capacity to learn and adapt has been shown to be vital in ongoing leadership development
Emotional Intelligence Competencies	Goleman, 1996; Boyatzis, 1999	Ability to understand and regulate self and social factors has been significantly linked to leadership efficacy
Supportive and trusting relationships	Boyatzis, 1999	These are vital in providing integral platforms for individual leader development as well as social capital leadership development
"Sparks"	Adair, 1997a	Individuals learn leadership principally from experience, but experience can be illuminated by principles and ideas, generating a spark connection which generates learning
Self-directed learning	Boyatzis, 1999; Goleman, Boyatzis & McKee, 2002	Leaders must be self-starters in ongoing learning and development; hinged on reflexivity and action-based learning
Genetics	De Neve, Mikhaylov, Dawes, Christakis & Fowler, 2013	Researchers at University College London appear to have identified a genotype, called rs4950, associated with the passing of leadership ability down through generations

Factor of Influence (continued)	Author(s)	Comments
Ideal self-image	Boyatzis, 1999	"Who do I want to be?" must have an answer which is consistent with good and effective leadership practice
Real self-image	Boyatzis, 1999	"Who am I?" must honestly identify strengths and gaps in skills, behaviours and competencies
Willingness to experiment with new behaviours	Boyatzis, 1999	Fear of experimentation will inhibit leadership development, where new behaviours and skills are vital
Role-modelling	Taylor, Taylor & Stoller, J.K. (2009	Proposed linkages between role modelling and mentoring in generating successful career development and leadership development

Table 3.12 - Other Research Examples of Factors that Influence Leadership Development. Source. Author

Although some of the array of factors which may influence leadership development are identified above, it was anticipated that each element of the analytical model would have a unique set of challenges and interfaces that would influence the overall outcome of the process (March & Olsen, 1975). However, this research must attempt to understand these factors of influence, as they generate insight into the phenomenological nature of the elements and interfaces. Also, by addressing these influential factors, the research directly generates praxis-orientated suggestions for future application of developmental interventions. Thus creating high quality learning and efficacy (Lipshitz et al., 2007).

It is an important observation that the potential array of *factors* is endless, and is entirely dependent upon the variables under observation. In the case of this research study, the variables relate entirely to the cardinal themes of leadership development identified in the literature review. Research Question One provides the source and framing for the variables, which would then fall-out of, or be observed, in the data analysis.

Analysing factors of influence within a social constructivist paradigm requires inductive reasoning and causality, which by implication should be inductive, interpretive, and historical (Pouliot, 2007). Equally, contextualisation is key to objectification.

A key point for consideration was how inductive causality might best be measured, and what sort of approach would mitigate causal complexity. The chosen approach was to employ a *catalyst* and *inhibitor* approach to identifying phenomenological factors of influence (Marion & Uhl-Bien, 2001; Ritchie, 2010). Through analysing catalysts and inhibitors the factors of influence (Fi) model is utilising inductive reasoning. This approach seeks to identify positive or negative influences on systemic

leadership development. These are differentiated as catalysts/positive and inhibitors/negative. More specifically:

- *Catalysts* are events or things that speed up a process, or make things happen that would not happen otherwise (Marion & Uhl-Bien, 2001).
- *Inhibitors* are negative factors that detract or inhibit a desired effect or outcome (Yüksel, 2013). Indeed, for the purposes of this research, inhibitors may be viewed as having the opposite effect of catalysts.

The catalyst-inhibitor approach within the Fi model must capture the multimodal facets of leadership development interventions (discussed earlier in the chapter), like corporate values, strategy and operational issues, where reality is constructed, socially and contextually, within a multifarious environment (Fairhurst & Grant, 2010). The approach must also be praxis-orientated. This second aspect is essential for meaningful leadership research, where, as discussed earlier in the chapter, any observations must be orientated so that theoretical contributions go beyond theory, into practice, where they must be interesting and relevant for organisational life (Alvesson, 2013).

This approach is schematically represented in **Figure 3.10** below.

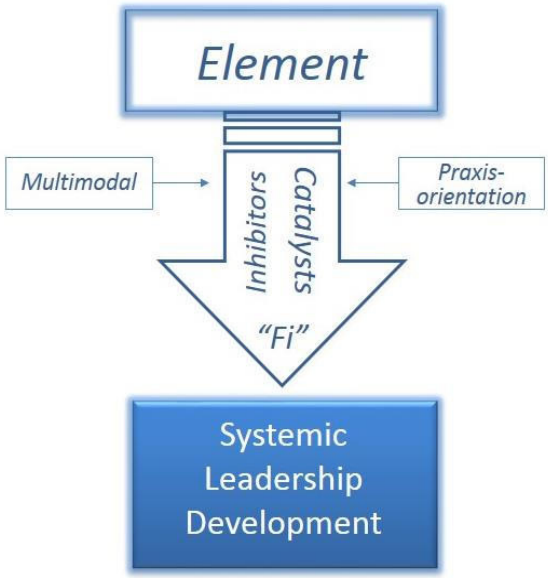

Figure 3.10 - Factor of Influence (Fi) Model: Catalysts and Inhibitors Approach. Source: Author

This catalyst-inhibitor approach is a transferable and repeatable process across all five core elements of the Fi model (and the additional *organisational leadership* element).

A catalyst-inhibitor approach has been widely efficaciously utilised in qualitative research (Marion & Uhl-Bien, 2003; Diezmann & Grieshaber, 2010; Ritchie, 2010). Indeed, Diezmann & Grieshaber (2010)

looked at catalysts and inhibitors in the achievement of new women professors in leadership roles. The study was a large-*n* mixed qualitative methods approach, of survey and focus groups, and revealed that the most critical catalysts for women's advancement were 'equal employment opportunities' and 'mentoring'; whereas, the key inhibitors to their advancement were 'negative discrimination', the 'culture of the boys' club', the 'tension between personal and professional life', and 'isolation'. The study ably demonstrated the power of utilising a catalyst-inhibitor approach and how knowledge of the significant catalysts and inhibitors provided a pragmatic, and praxis-orientated, way to orient universities towards promoting women into professoriate leadership roles.

The Inductive interaction of the factors of influence is fundamentally causal phenomena. It is acknowledged that causality in leadership studies can be extremely complex, for example, due to multi-way chains of causality (Marion & Uhl-Bien, 2003), however, robust analysis protocol and clear analytical methods, coupled with utilising tried and tested methods, will mitigate potential flimsiness in attributing inferential causality.

Any utilised conceptual model is fundamentally an arbitrary interpretation of organisational interactions, with trade-offs and obligatory fallibility (Daft & Weick, 1984). Admittedly the Fi model (**Figure 3.10**) is a rudimentary construct and is not explicitly sophisticated. However, the researcher considers this a strength, as it provides flexibility and scope for the data analysis and theory-building to cover a wide range of potential leadership development phenomena.

There was a deliberate rationale to explicitly limit and define the elements of the model around Research Question One. This was consciously targeted as to manage the potential over-whelming complexity and volume of data inherent in qualitative data research. This would also allow the closest proximity between the development of theory and practice, and provide a model consistent with Miles and Huberman's (1994) observation that (sic) "*it's a direct step from conceptual framework to research questions*" (p.22).

Thus, the role of a conceptual analytical framework is to clearly identify and explicate the main phenomena to be studied and the presumed relationships between them (Miles & Huberman, 1994). The Fi model does precisely that. Furthermore, the Fi model outlined above produces a tractability between the conceptual and empirical, generating logic of discovery, rather than logic of validation; constructing understanding rather than explanation (Maanen et al., 2007).

The Fi model provides a powerful conceptual analytical model through which the nature of phenomenological interaction between the cardinal themes of leadership development and a systemic definition of leadership development can be analysed and compared across two case studies and

validation study data. It provides a direct application of Research Question One within an analytical model.

Furthermore, the analytical framework must also consider Research Question Two:

> RQ2. *What recommendations and theoretical solutions have emerged from the findings with regards to generating efficacious systemic leadership development?*

This question essentially addresses the products of a comparative analysis of the findings of Research Question One. The comparative analysis was conducted during the cross-case analysis and research findings discussion, and was the second part of the analytical framework, along with the Fi Model.

It was recognised that a comparative approach to analysing the case studies and validation study would be an effective approach to drawing meaning out of critical analysis, with regards to answering both research questions. It is also intrinsically a key element of the case study method during the cross-case analysis phase.

A comparative analysis approach in historic leadership research has been widely used, with prominent examples being: Leadership development (Day, 2001, Page & Miller, 2002), political leadership (Lawrence Evans, 1958; Vedder, 2010; Helms, 2012), effective leadership (Rejai & Phillips, 1996; Mumford, 2006) and military leadership (Foisy, 2008; Roberts, 2008). These researchers demonstrated that a comparative analysis approach has many benefits, such as allowing researchers to create generalisations based on multi-perspective commonalities; to test qualitative assumptions and inductive conclusions with extraneous validity; to measure the consistency of experiences across multiple domains; and to identify emerging best practices and lessons learned.

These benefits support the development of robust hypothesising and theoretical assimilation within qualitative research methods and analysis, and for these reasons, has been integrated into the analytical model.

The essence of comparability should be hinged on contextual and phenomenological commonalities between the two case studies and validation study. No commitment is made to claim definitive and absolute consistencies; indeed, such a claim would be imprudent even within same-sector analysis (Espedal, Gooderham & Stensake, 2013). The purpose is to generate sense-making from phenomena which would allow an acceptable degree of generalisations - via suggestive framing - providing direction-markers or road signs for progress within theoretical and practicable understandings, which would head us some direction towards remediating the research problem outlined in Chapter One.

3.4 Conclusions on Research Design and Strategy

This chapter has clearly laid out the research design and methodology. It was argued that systemic leadership development is most efficaciously explained within the social constructivist paradigm, where it is regarded as an assemblage of processes, actors, interactions, activities and relationships, which rehearse through a cycle of negotiation, acceptance and re-negotiation. Within this is an implicit influence of social factors and contextual factors; which are best described as multi-modal in nature.

It was identified that a qualitative approach most suited the phenomenology of the study and that a case study approach would ideally explicate the cross-sector, comparative and pragmatic nature of the research problem. Yin's (2003) case study approach was espoused, with the addition of an extraneous validation study to support triangulation and theory-building validity. These processes were systemically supported by Yin's quality test approach (1994) and Eisenhardt's eight-stage taxonomy (1989) for efficacious theory-building and validation.

Finally, the chapter developed a conceptual analytical framework for analysing target phenomena within the case studies and validation study, and provided a model for generating inferential relationships and theory building by identifying factors of influence, through use of a 'Fi Model', and providing comparative recommendations, through comparative analysis, leading to the development of theoretical solutions for the Research Problem outlined in Chapter One.

CHAPTER FOUR – FINDINGS AND DISCUSSION

WITHIN-CASE AND CROSS-CASE FINDINGS AND DISCUSSION

4.0 Introduction to the findings and discussion chapter

The preceding chapters have critically reviewed the research problem, identified research questions, generated a series of themes and target phenomena for analysing the problem, and developed an analytical framework for conducting the analysis.

This chapter aims to describe, analyse and understand two cross-sector case studies of mid-level leadership development, and a validation study, followed by cross-case analysis and research discussion.

The analysis will be conducted over two stages: (1) Within-case analysis of both case studies and the validation study, utilising the Fi model in identifying factors of influence, through catalysts and inhibitors, and (2) Cross-case analysis, applying comparative analysis across all of the cases. Parts One to Three cover the within-case analysis; Part Four, the cross-case analysis and findings.

Within-case analysis involved detailed write-ups for each site and experience, and aided the researcher manage the sheer volume of generated and potentially available data (Eisenhardt, 1989). The generation of insights was an important principle in the process, as it guided the direction and content of write-ups (Eisenhardt, 1989). The overriding purpose of the within-case approach was to query what this case informs us about practice, and theoretic implications, within the sector. The approach is constantly evolving and acquiring meaning, until the outcomes are demonstrably both valid and applicable (Ritchie, 2010). Each case study involved a triangulation approach (as discussed in Chapter Three), but critically, involved interviews with a systemic range of key actors in the leadership development programmes. This range included board-level sponsors of the programmes (HR directors), programme managers, programme trainers and programme participants. The interviews were aimed at generating socially constructed descriptions of the leadership development programmes, looking specifically at the influential role of the cardinal themes, within the knowledge of each of the interviewees.

The cross-case analysis involves comparative analysis of the factors of influence across all of the cases, drawing out rich and broadly evidential observations about how certain factors potentially contribute towards efficacious systemic leadership development. These meaningful, and substantiated

observations led to clear extrapolations on potential theoretical solutions for dealing with the research problem, across the cardinal themes of systemic leadership development.

PART ONE – WITHIN-CASE STUDY ANALYSIS (CASE STUDY A)

4.1 Introducing Case Study A: Mid-Level Energy leadership development Programme

Part One will discuss the findings from the research analysis, covering organisational leadership and cardinal themes of leadership development; looking at which factors of influence, through applying the Fi conceptual analytical model, potentially generate systemic leadership development.

4.2 Case Study A – Understanding Organisational Leadership

To ground or contextualise the research constructivist phenomena, it was important to generate an understanding of what organisational leadership meant to the interviewees. During the interviews the participants reflected on which leadership skills and behaviours were required of leaders within the organisation; and how well they were demonstrated and developed within the wider organisational context. The data analysis demonstrated considerable divergence and confusion across personal interpretations.

With regards to participants' interpretations being consistent with a SAEI perspective of leadership the analysis demonstrated several paradoxical contentions in interviewees' constructs of organisational leadership, which potentially contribute inferentially to the efficacy of subsequent systemic leadership developmental interventions.

The inferential factors of influence which emerged out of the data analysis process will now be discussed in detail.

Figure 4.1 shows the respective emergent analytical factors now discussed.

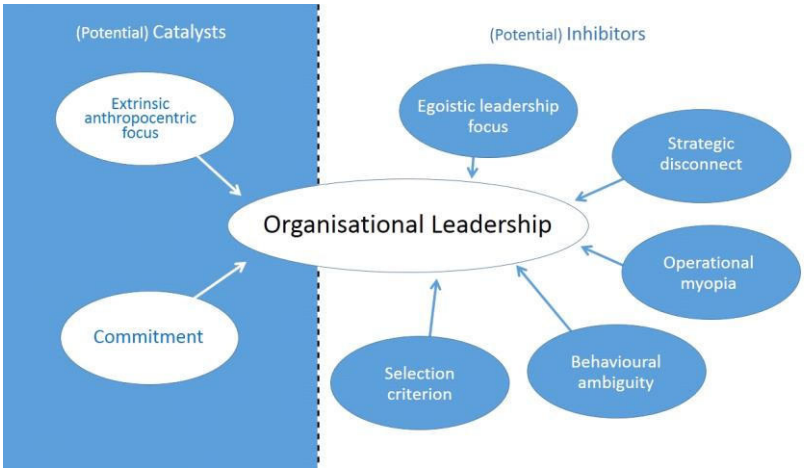

Figure 4.1 - Organisational Leadership Fi Analysis. Source: Author

Inhibitors – Organisational leadership

4.2.1 Egoistic leadership focus

The analysis revealed an inhibiting egoistic leadership development focus. Although a certain degree of narcissism can produce positive transformational leadership behaviours (Kets de Vries, 1994), the analysis showed that in this particular case egoism was potentially generating 'prima donna' syndrome (Espedal, Gooderham & Stensaker, 2013). The external leadership trainer remarked that a significant amount of the participants demonstrated an unteachable character and presupposition that "…*I know all that*…" [ELT-011]. This egocentrism generated obtuseness and arrogance: "…*they're not really grounded*…" [ELT-010]. The egocentrism focus was further revealed in some of the motivational reasons for programme attendance: "*…career development*" [ELT-24], *"this is a personal development plan opportunity*" [EEP01-051] and "*…job after course…*" [EPP03-059]. Rather than an opportunity for meaningful leadership development, the programme was a *"tick box exercise"* [ELT-009] leading to promotion. Although those particular reasons in themselves are not negative, when they produce an unteachable, self-centred attitude in the participants, they inhibit the potential for systemic - SAEI perspective - leadership development. Curiously, when the programme content matched their personal development needs (e.g. relevant technical model or career-enhancing mentoring partnership) they reported greater satisfaction.

4.2.2 Strategic disconnect

The analysis also revealed a disconnection between the application and significance of leadership - and its development - and delivering strategic direction and alignment within the business. This disconnect was manifest in numerous participants' responses. Of the three interviewees not to recognise the issue, significantly, two of those were the programme owner and the programme manager. Their

omissions would potentially explain two of the key issues with this inhibitor: a lack of integration of big picture thinking and alignments in the desirable leadership mind-set and developmental programme design.

The analysis demonstrated that senior leadership within the business had not clearly articulated or reconciled strategy with mid-level managers, and that there was a distinct lack of integrating big picture notions within desirable leadership mind-sets. This absence, noted by the leadership trainer, was conspicuously evident in the leadership programme participants:

> *"…one of the two things for me is… if they think bigger than where they are currently, you know. It's, they say, 'Ok'… how does that connect with the bigger picture? How does that connect with the business things to go, and things like that...? I think for me that's one of the biggest things that they struggle with."* [ELT-003]

Partly, this is due to the extant leadership culture within the business - promulgated by senior leaders – which is operationally driven, technically-minded and short term in focus. However, this was not to suggest that good leadership was absent or insufficient at strategic levels of the business; as senior leadership was recognised as being good:

> *"…there is quality leadership at the top… just the messages aren't right or inspiring… they're all about profit and business decisions… this draws the horizon closer…."* [EEP07-0001]

The issue over the business not promulgating big picture thinking and strategic focus may sit in a 'leadership gap', beneath the senior leadership level:

> *"Probably underneath them there are some good guys, but I am not convinced wholly we've really got leaders of quality."* [ELT-006]

This would inferentially suggest a lack of engagement in systemic leadership development, and also that leadership is not viewed as a social capital issue within the business. With regards to affecting systemic leadership development, a lack of strategy integration and focus may inhibit the business's ability to develop essential systemic elements, like setting direction and alignments within organisational development, or failing to foster cooperation, coordination and networks within social structures and processes.

This observation is supported by another key strategic disconnect issue: The programme is not designed efficaciously for integrating strategic direction:

"…I don't think anyone has really sat down and thought that design through properly." [ELT-005]

This design inefficiency is demonstrated regularly across multiple accounts in the analysis:

"…I don't recall much emphasis on strategy…" [EPP07-003]

"…I can't see a link between desirable (business) leadership traits and the leadership development programme…" [EPP05-006]

"…not teaching (leadership behaviours)… you're left to figure it out… remotely…" [EPP06-005]

However, it is important to recognise that strategy integration must be purposively designed into developmental interventions in order that desirable leadership skills, behaviours and mind-set are situated and aligned to long term, SAEI perspective, strategic leadership needs (Cacioppe, 1998). Indeed, strategic purpose includes the very reason for conducting leadership development, something the leadership trainer stated he was *"…not sure they (participants) fully understand…"* [ELT-011]. This was also manifest in the observation that the programme manager experienced *"…difficulty in getting buy-in and attendance*…" [EPM-005] amongst line managers and participants on the programme.

The inherent lack of strategic leadership orientation and programme integration appears to be inferentially linked with another, perhaps more significant, emergent factor: a short-sighted bias for operational delivery and short-term results within organisational leadership.

4.2.3 Operational myopia

The other side of the *strategy disconnect* coin is a detrimental leadership myopia for operational delivery and short-term results focus. This was a significant theme in the analysis; as if organisational leadership had become singularly fixated with operational delivery. Of the ten references across seven interviewees, they were emphatically consistent in their observations. Essentially:

"…everything is about delivery in this organisation…" [EPM-049]

This important observation by the programme manager visibly exposed her frustration with competing cultural dialectics. She identified the 'delivery' performance culture as being a grossly inhibiting factor in developing a long term orientated, socially-responsible, leadership culture. This delivery culture inhibited systemic leadership collective synergies, such as cooperation and forging commitments, and organisational cultural development, as managers would be compelled to elevate operational needs and targets above individual or social needs. In effect, generating a predominating transactional leadership culture, where transformational aspects are rendered irrelevant. This was demonstrated in

the programme manager's response to whether the organisation is effective in developing desirable leadership behaviours:

> *"…it's not. They (leaders) are measured in results…deliverables… not leadership."* [EPM-004]

This operational myopia has resulted in mid-level leaders having a distinct lack of awareness of systemic and strategic leadership needs. This was transparent in their responses. The leadership trainer described this myopia as mid-level leaders *"…not thinking in business ends…"* [ELT-001], but rather *"are up to their necks in muck…"* [ELT-007]; short-term fire-fighting. Essentially, performance delivery fixation consequently led managers to purely focus on a survival need to "…*drive results*…" [EPP01-005].

The programme owner (Global HR Director) explained why this emphasis exists:

> *"..what kind of people will be successful within (business)?…definitely around a focus on delivery...we tend to want leaders that are focused on an absolute objective and will get to that…as a general theme we are a project management company…so that is the overriding one I think…"* [EPO-001]

Naturally it is explicable that a technical engineering project management business would focus on technical competencies and delivery on projects. However, with regards to leadership rather than management attributes, this emphasis may generate an overwhelming task-leadership bias; to the detriment of individual- and team-leadership needs (Adair, 1997b). A potential issue here is the conflation of management skills and competencies and leadership behaviours and skills.

4.2.4 Behavioural ambiguity

The potential negative effect on leadership behaviours appears as a blurring of which behaviours are truly desirable. For this case organisation it is *"…all about high performance behaviours"* [EPP02-001].

The issue is whether performance behaviours are abstracted from leadership behaviours; and are they seeking management competencies opposed to leadership skills.

When asked about corporate desirable leadership behaviours, participants' reflected:

> *"…deals with poor performance and rewards…"* [EPP03-003]

> *"…drive business forward…"* [EPP03-005]

> *"…clear decisions…driving right direction…"* [EPP06-001]

These examples can be interpreted as transactional in nature, with a technocratic focus. One participant observed that the emphasis was to *"…reshape the square peg…"* [EPP04-004]. It remained to be seen if that reshaping was consistent with a SAEI perspective of leadership, which was strategically orientated, and with emotional intelligence that engendered transformational leadership, breeding social well-being, morale and motivation (Drouillard and Kleiner, 1996).

Furthermore, without clear direction on desirable corporate leadership behaviours - it was recognised that the programme was *"not teaching"*, rather the participants had to *"figure it out*" [EEP06-005] - this ambiguity leaves the potential for a plethora of negative, egoistic and negative behaviours to flourish in the singular pursuit of delivery excellence and higher performance (Reed, 2004).

The ambiguity around desirable leadership behaviours was crystallised by the fact that none of the interviewees could recall the twelve corporate behavioural traits of the business; not even the Global HR Director. Equally, the interviewees did not demonstrate any particular concern or consideration for them; one even regarding them as "*corporate wall paper"* [EEP07-0002].

Without clear definitions - embodied in desirable behaviours and targeted behavioural development - there seems to be leadership-management definitional conflation. The analysis showed that despite aspirations and desires to develop people-centric leaders (discussed below - Catalysts: Commitment), in reality, the cultural imperative elevates management competencies as the panacea [EPP06-029]. With the resultant obvious observation that management competencies do not necessarily correlate to leadership behaviours [EPP05-28]. This conflation exists clearly in this case study.

4.2.5 Selection criterion

The final significant inhibition identified in the analysis was with regards to selection criterion. There was a widely-held perception that the programme had in many cases selected the wrong people for participation; manifest in an apparent lack of suitability and poor performance. One participant complained that programme management were "*not smart at selecting people for this course."* [EPP03-065]. This participant elucidated further:

> *"…there were some people there that (one) certainly felt like they'd been selected because their manager felt like it would be a nice thing to do…or they'd expressed an opinion about wanting to do it…without understanding what was actually involved…it's a strange situation... it's a learning opportunity for the people that want to learn. It seemed a bit strange that was as at the expense of people who didn't want to…"* [EPP03-066]

This participant observed that those individuals showed little ability or intentions for changing their attitude and behavioural approach, and that the most effective remediation would be that "*selection criteria must be improved*" [EPP03-072]. This observation about poor selection was observed across several participants:

> *"…they don't think who they put on the course…"* [EPP05-005]
>
> *"…wrong selection for leadership development participants…"* [EPP04-006]
>
> *"…they were put on the course simply because they were there… however, this reduces benefit for those with real intentions…they were there just to make up the numbers…"* [EPP04-007; EPP04-009]

Subsequently, the participants that harvested the greatest benefit from the programme were those recognised as high potential performers (HiPos), on fast track career management processes, and understood the demands and benefits of participation. Those individuals reported greatest benefit from contextualisation and mentoring support. They also were able to recollect greater amounts of learning and knowledge from the programme.

Ironically, the programme owner (Global HR Director) held the assumption the programme was *"…more targeted in who they develop…"* [EPO-003]. This, again, perhaps reflects the strategic disconnect between intentions of the programme and actual practices.

The other problem recognised by the participants was poor performance on the programme by those sub-par selected participants. This was due to differing approaches to the programme experience. They demonstrated a "*lack of readiness…for the content…not (using) same language…*" [EPP04-008]. This generated frictions and frustration amongst group work and activities, with the higher calibre participants feeling like they were carrying the others. Indeed, those high calibre participants felt the "*others were not the slightest bit interested in engaging with the process"* [EPP03-069]:

> *"…it's a bit churlish if that was the plan to put people through it just to make it a learning experience within the broader spectrum… I think it was unfair on that people, because it was putting them through an experience that they felt unpleasant…"* [EPP03-069]

Subsequently, it was observed that these sub-par participants demonstrated "*no meaningful change*" [EEO04-010]; "*as if they had not been on the programme at all*" [EE004-010]. This has a potentially direct negative impact on developing systemic leadership development, across team synergies and building efficacious social structures.

Catalysts – Organisational leadership

4.2.6 External anthropocentric focus

The analysis also revealed several potentially positive catalytic factors for organisational leadership. The first of those - an *external anthropocentric focus* - was consistent with systemic, SAEI orientated leadership. The analysis showed that most of the participants had an intuitive cognition for a people-centred focus in leadership.

Core to interviewees' notions of leadership was the necessary social role of leadership. This was manifest in reflections of the programme owner - *"…it's about engaging people"* EPO-002 - as well as in all of the programme participants. The participants recognised the need for leaders to *"develop other people"* [EPP01-006] and to *"develop culture"* [EPO-006] that is *"…inspiring to others"* [EPP07-002]. Subsequently, they identified that a leader within the organisation should be a *"people person"* [EPP03-004] with particular skills such as *"…motivating the team and effective delegation"* [EPP06-003] and *"communication and collaboration"* [EPP04-002].

However, it must be stressed that despite the above intuitive systemic awareness regarding the SAEI nature of leadership, it was reported by half of the participants that the programme was not efficacious in developing these aspects.

4.2.7 Commitment

Coupled to the external anthropocentric focus is a clear intentional commitment reflected in the interviewee responses for displaying good leadership; this is despite the evidential paradoxes and contradictions with the inhibitor factors discussed previously. The responses from the participants revealed an instinctive appreciation for key elements of good leadership - e.g. inspiring others [EPP07-002], engaging people [EPO-002], collaboration [EPP04-002], motivating the team [EPP06-003] - and agreement or commitment that those are the desirable characteristics of which leadership development should endeavour to yield.

4.2.8 Systemic Leadership Development observations

The analysis in this section revealed some fundamental contentions and paradoxes with generating systemic leadership development. Some of these contentions were significant, such as the inhibitors *strategic disconnect* and *operational myopia*, which potentially have a negative influence on the definitional imperative of being orientated towards long term organisational impact. Equally, the *egoistic leadership focus* directly contributes towards promulgating an egoistic impact of developmental interventions, which in turn potentially negates systemic aspects of generating

collective synergies, organisational development and social structures and processes. Despite the fact that a social orientation of leadership was intuitively manifest in the interviewees' responses, this was not directly correlated with their pragmatic observations of organisational leadership and their leadership development experiences.

4.3 Case Study A – Fi Thematic Analysis: Catalysts and Inhibitors

The within-case analysis will now specifically critically discuss the cardinal themes from the literature review (Chapter Two), which in turn generated the thematic elements of the Fi model (Chapter Three), and were reflected in the Research Question One:

> **RQ1**. *Systemic leadership development is influenced by which factors, across the cardinal themes of inquiry?*

4.3.1 Element One: Delivery

The researcher looked to delve deep into interviewees responses, by asking them to extrapolate value judgements alongside their reflections on how the developmental interventions were delivered (i.e. were they delivered to positive or negative effect with regards to experience).

There were various emergent themes, when applying the Fi model, in the delivery thematic analysis. Such as, the absence of any reference to job assignments as a developmental intervention, despite reference in the programme design; that networking was generally viewed positively whilst conducting multinational group discussions; and that the programme was criticised for being excessively classroom based.

However, significant observations emerged regarding the delivery of coaching and mentoring on the programme; specifically concerning leadership trainers. These were the predominant themes, revealing extensive potential factors of influence. Subsequently, these two aspects 'coaching' and 'mentoring' were broken into to sub-categories of *Element One: Delivery* for purposes of expanding the potential factors. This was because trainers were either coaches or mentors; two roles, two persons.

The analysis of the delivery coaching approach of the leadership trainers exposed some important potential inhibitors and catalysts, and are demonstrated in **Figure 4.3** and subsequently discussed.

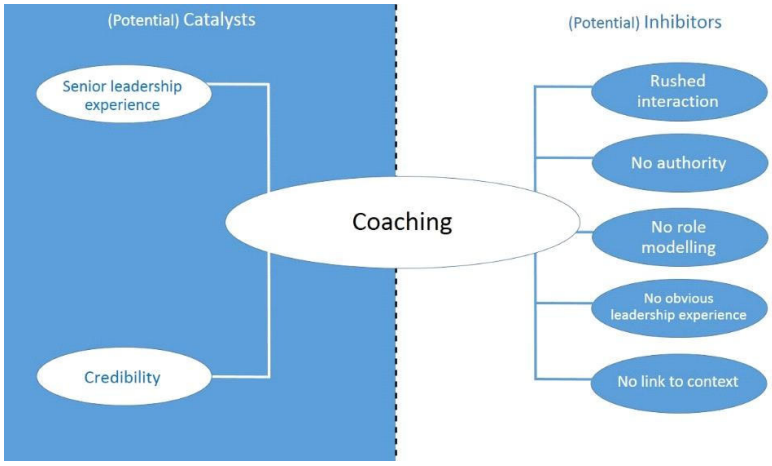

Figure 4.3 - Element One: Delivery - Coaching Fi Analysis. Source: Author

The analysis showed a mixed response to the trainers: 50 per cent received praise, whilst the other 50 percent received criticism. Evidential reasons for the differentiation are included in the discussion here.

Inhibitors – Delivery: Coaching

4.3.1.1 Rushed interaction

It was felt that the interaction between participants and trainers was "*a bit rushed*" [EPP04-012]. This resulted in the coaching interaction being "*…too little involvement to be effective*" [EPM-008]. This sentiment of hurried and frantic interaction, to engage in meaningful coaching development, generated some negativity in the participants, who remarked that it was "*not a great experience… too fast and busy*…" [EPP02-012], with flippant remarks like "*what we took away was a headache*" [EPP02-013].

4.3.1.2 No authority

The analysis demonstrated causality with regards to criticism aimed at one of the trainers: "*she was seen as a peer, not a facilitator*" [EPP02-014] and she was just "*one of the team*" [EPP02-015]. This peerage impression resulted in a lack of authority and respect being given the facilitator, with resultant criticism, such as, that she had the "*wrong style*" [EPP02-017] and that she had "*energy, but at the wrong party*" [EPP02-030]. It was clear from participants' comments and observations when they discussed her, this lack of perceived experiential and formalised authority undermined the facilitator's ability to coach participants. Much of this perception was a manifestation of participants' expectations of what a trainer should be.

Another negative aspect of the trainers having no authority was the negative trade-offs of unguided learning processes; that participants were Left to "*develop selves*" [EPP02-006] and "*what we as individuals needed*" [EPP02-008]. However, this unguided process potentially provided an inhibitor for developing prescribed desirable organisational leadership. Without authority, it was perceived that it was "*not their role to develop us… it's about what 'you' get from it…*" [EPP05-007]. However, it was clear from the analysis that this learning approach was having a negative effect in generating systemic leadership development.

4.3.1.3 No role modelling

The analysis also showed that the criticised trainers were not seen as effective role models for the participants. Criticisms ranged from their unsuitability to coach the participants: "*I don't know why they were selected…nothing special*" [EPP05-010] and "*no evidence of why they were selected*" [EPP06-008]; to the quality of their coaching delivery: "*…some a waste of time*" [EPP01-011]. The lack of role modelling was evident in that there were no positive statements made by any of the participants to suggest the trainers were providing any form of idealised influence or archetypal example.

4.3.1.4 No obvious leadership experience

The criticised trainers were perceived, by participants, to have no relevant leadership experience. Much of this was correlated with a lack of contextual experience. Also, participants were evidently expecting something 'special' [EPP06-008] from the trainers that would manifest as efficacious coaching. However, instead they perceived that the trainers were "*selected on recommendations and on budget*" [EPM-13] and, on "*…who they know…*" [EPP05-009]. This selection approach left the participants confused as the leadership coaching credentials of some of the trainers: "*it's difficult to see what skills and experience trainers brought*" [EPP06-013].

4.3.1.5 No link to context

The analysis showed that the trainers often "*couldn't get the messages to land*" [EPP02-033], this was generally perceived to be due to the coaching engagement being "not contextual" [EPP04-015] and often the "trainers (were) so far out there, they couldn't connect…because they didn't understand technical outlook" [EPP04-019]. This might be due to only one of the trainers being from an engineering background, whilst the others were "*HR, publishing and retail*" [ELT-015]. This meant that despite many correlations in "*experience and story-telling… but not in our context*" [EPP02-025]. There were occurrences where aspects of the learning landed and were explicated as relevant to the participant, in these examples contextualisation played a pivotal role:

"*Relevance was good... it was good because we happened to discuss the context I was in*!" [EPP03-018]

"*Cultural tools were relevant; 'why' was understood*." [EPP02-011]

It was widely recognised that there was "*opportunity for more structure and competencies…direct learning behaviours*…" [EPP05-0080] with contextualisation providing a key catalyst (discussed in Element Two: Contextualisation).

Catalysts – Delivery: Coaching

4.3.1.6 Senior leadership experience

Looking at positive comments directed towards the trainers the analysis showed "…*previous leadership experience*" [EPO-012] was seen as a catalyst for positive perception and coaching effectiveness. When the trainer "…*had previously had senior leadership roles, (they were) therefore that bit more strategic*…" [ELT-013] and could subtly identify the important themes for coaching the participants. They also were respected as "…*having done it*" [EPM-014]. The strategic leadership insights they brought allowed participants to tap into "*business experience at senior levels*…" [EPM-014].

4.3.1.7 Credibility

The analysis showed that credibility was a key desirability and catalyst for effective coaching interaction. The credibility was linked to several key elements:

"*Engineering background*" [ELT-015]

"*Industry experience then moved into training and development*" [EPP01-016]

"*Long term project experience*" [EPP01-013]

"*People development experts*" [EPO-013]

Those elements of credibility were evidentially tied to technical and contextual knowledge and experience, and appropriate people-centric delivery and engagement; such as the cultural awareness trainer – who was observed as being "*top of their game…and exceptional*" [EPP02-004] and "*inspires through knowledge of culture*" [EPP02-024]. Another example of credibility was when a trainer knew the business context: her "*knowledge of the business was essential… for us it included what management are looking for*" [EPP06-010] and "*knowledge of the business and what hurts the business and why*" [EPP02-028].

Like with coaching, the analysis of the delivery approach of the leadership mentors exposed some important potential catalysts and inhibitors.

These are demonstrated below in **Figure 4.4** and subsequently discussed. As stated, mentors were different to the trainer coaches; they were senior managers from within the business who were selected to pair up with participants of the programme, to provide support throughout the programme.

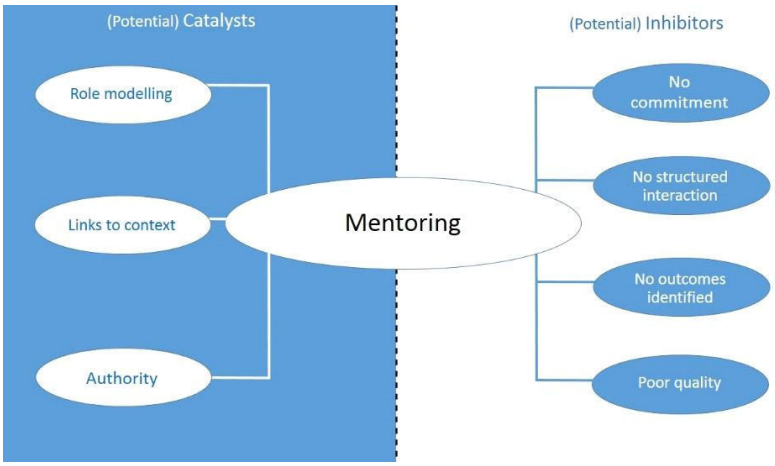

Figure 4.4 - Element One: Delivery - Mentoring Fi Analysis. Source: Author

Inhibitors – Delivery: Mentoring

4.3.1.8 No commitment

The analysis showed a varying degree of commitment to delivering mentoring. The basic commitment is supposed to be a partners meeting between the participant and their mentor once a month [EPP01-027], however in reality, in several cases this basic level was not being met. In these cases the efficacy of the intervention was significantly negated:

> "*…my mentoring didn't work… the relationship with the senior person did not work… he was an inappropriate mentor, who was demotivated and cynical about everything… we had two or three meetings, then he gave up. So I gave up and didn't use it… a good mentor must generate time to commit… and be of the right calibre*." [EPP03-024]

> "*…I had very little interaction with the mentor… it was seen merely as face time. An opportunity to observe company behaviours and thinking at senior levels…*" [EPP07-0111]

4.3.1.9 No structured interaction

The analysis demonstrated that without clear structure and integration mentoring can suffer from an inhibiting ambiguity and isolationism. This was evident in observations by the programme manager that she does not have interaction with any of the feedback and content of the mentoring partnerships "…*I don't see it or have it*…" [EPM-024] - making any follow-up with the participants' development impossible; along with it making systemic alignments or measuring consistency. The content of the feedback or structure of the partnerships rests "*mainly with the mentor*" [EPM-028]. However, this allows for error in what is required of the process, as manifest in some of the participants' responses:

> "…*my mentor seemed to be confused over the definition… she thought it was not to develop leadership.*" [EPP05-009]
>
> "…*this was mentoring remotely, not providing leadership.*" [EPP03-055]
>
> "…*not so much feedback but just general mentoring.*" [EPP01-027]

The structural and approach ambiguity expressed in the responses suggested an inhibition in the potential efficacy of mentoring interactions.

4.3.1.10 No outcomes identified

Coupled to the lack of structure and purpose with the mentoring interactions was the apparent absence of identifying desirable outcomes. None of the participants identified agreed outcomes or contract between the parties. When one participant was asked what the purpose of the mentoring partnership was, he responded: "…*it's not clear how we are going to use it going forward… or how is it linked*." [EPP02-051]

4.3.1.11 Poor quality

The analysis showed that providing poor quality mentoring can potentially inhibit the generation of systemic leadership development. One participant when considering what makes a successful mentoring partnership, reflected, it "*depends how strong the mentor is*…" [EPP02-50]. This emphasis towards the strengths of the mentor indicates an expectation from the participants that they are being developed to the organisation's expectations; to the needs and objectives of the business. This generates a paradox with the self-development and ownership emphasis discussed earlier. When discussing the quality of mentors, the programme manager explicated that there was a "…*varied competency in mentors*…" [EPM-025].

Catalysts – Delivery: Mentoring

4.3.1.12 Role modelling

The analysis identified several potential catalysts for effective mentoring interaction. Firstly, it was evident that participants were looking for individuals who provide inspirational guidance on how to lead in the organisation:

> "*A mentor should ideally challenge the partner… understand drivers and provide steers… (be) motivated, enthusiastic, interested in people… they should spot individual needs*." [EPP03-029]

According to this insight, the mentor - as a role-model figure - should have the authority, either formally or informally, to challenge participants through their development; provide contextual knowledge of business drivers and steers on how to navigate real-world pitfalls and challenges; and the transformational leadership and emotional intelligence skills to inspire and engage with the participants in an authentic leadership manner.

4.3.1.13 Links to context

Thus, providing linkages to contextualised leadership appears to be a key responsibility of the mentor. They provide systemic integration and consistency for the participants; a recognition that there is an objective environment with certain fundamentals and expectations, which guide leadership manifestations.

4.3.1.14 Authority

The notion that mentors should challenge participants invokes a recognition that some form of authority is imbued. Here mentors are expected to be systemic arbitrators or custodians of organisational leadership expectations. One participant explicated this observation in his description:

> *"…the advance partner (mentor) is vital…invaluable in providing linkages to the business… what is expected of us… what we should be like in the future.*" [EPP02-072]

This potentially provides a clear linkage to systemic leadership development; where systemic leadership needs are embodied in the mentors, who promulgate organisational needs and expectations, through role modelling, contextualised leadership and supported by authority.

4.3.1.15 Systemic leadership development observations

The analysis of *Element One: Delivery* demonstrated several important factors of influence for generating systemic leadership development.

The analysis uncovered potential inhibition in the design of the leadership development programme: ambiguity with regards to systemic leadership behaviours and a lack of strategic (long term) focus in the developmental interventions. This behavioural ambiguity potentially affects social awareness across all aspects of the systemic leadership development definition, as it fails to explicate a desirable conduct or expectation from all leaders, regardless of operational-environmental contingency.

The coaching analysis also uncovered some potential systemic factors of influence, such as the inhibitions caused by rushed social interaction between trainers and participants. Participants were not receiving sufficient interaction to generate meaningful social awareness of organisational leadership. Also, those providing the coaching were not authoritatively representing the systemic needs of the organisation. This resulted in the broader, organisational concepts of leadership, not being developed within the participants. Instead, the students were left to develop themselves - un-unified with the systemic whole - which naturally produces an egocentric orientation at the expense of generating collective synergies, organisational development and social structures. Furthermore, the lack of contextual linkages for leadership development meant that individual leader development was unseeded or grounded in organisational necessities. Without an understanding of future-context requirements there was a lack of directed learning.

The mentoring analysis also generated some potential systemic factors of influence, most notably with the contingency in commitment and competency to support the participants. Some mentors did not represent the systemic needs of the organisation, with little integration or concern for future, long term organisational development needs and wider collective synergies and social processes. Rather, it appeared the mentoring relationships were isolated, unguided and unintegrated interactions.

4.3.2 Element Two: Contextualisation

The analysis of the Fi Model *Element Two: Contextualisation* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.5** and subsequently discussed.

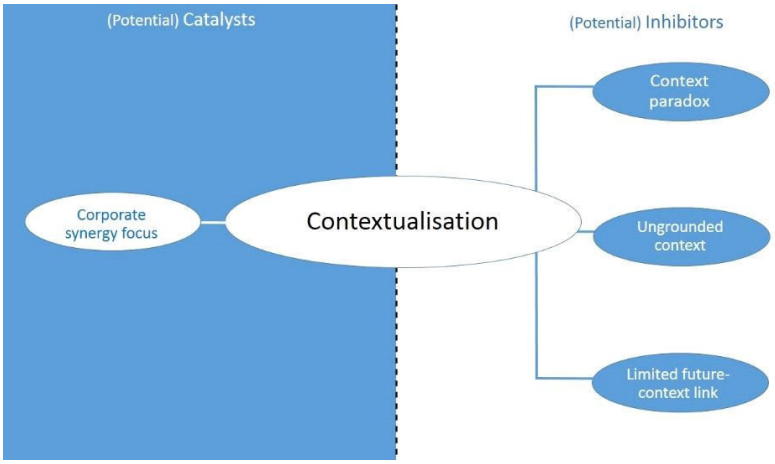

Figure 4.5 - Element Two: Contextualisation Fi Analysis. Source: Author

The analysis generated three prominent, and interconnected, potential inhibitors: *context paradox*, *ungrounded context* and *limited future-context link*. The paradox inherent in the first inhibitor perhaps explains the inhibitive developmental factors of the second and third. Those three inhibitors are discussed below.

Inhibitors – Contextualisation

4.3.2.1 Context paradox

The analysis revealed a paradox in the views of the programme management and delivery team with regards to the meaning, nature and role of context in developmental interventions. The programme owner (Global HR director) postulated that:

> *"The programme focuses on transferable skills… there are no significant differences in context, they are rather subtle, mainly geographic… environment is more important than operational or technical… therefore a global culture focus is paramount…"* [EPO-015]

This view proposes that operational leadership across the organisation is generally comparative and transferable, with the key differentiation being merely geographical and cultural awareness.

This geographic differentiation view is supported by the programme manager (training and development manager):

> *"…the programme is designed such that it caters across the geographies and sectors…"* [EPM-016]

However, the programme manager stated that:

> *"…the programme must do the opposite* (of contextualisation)*… because contextualisation is not common across the business"* [EPM-017]

This view of highly differentiated contexts across the organisation differs from the view of the programme owner of merely subtle differences. This contention around how to identify context and integrate it into the programme was particularly apparent in the reflections of the leadership trainer, who demonstrated little understanding of contextual and operational needs of the different areas of the organisation, and regarded contextualisation purely as a reflexive personal development phenomena:

> "…*they* (participants) *have seen that* (contextualisation) *as a learning experience… they see it as an opportunity to speak to senior people."* [ELT-024]

When asked about how the trainers integrate contextualisation into the programme, his response identified group-based conversations as the sole medium. Again, the personal development orientation was identified as being intrinsic to any notions of contextualisation:

> *"Well its, em, it's probably through conversations we have. The format of these workshops is that we do something and they do something then they all come back together to share it, so we have a contrast. The conversation in general is then about how it applies to their work place. Or you can aim or you can plan, but how does that apply to your daily working life? How is that going to help you make a difference? How is that going to help you in your career development? So, it's really through conversation."* [ELT-023]

Across these three positions, it was apparent that the leadership development programme management team had not reconciled what was meant by 'context' on the programme, and this potentially has led to other potential inhibiting factors.

4.3.2.2 Ungrounded context

The analysis uncovered a purposive intent to avoid contextualisation (beyond global cultural perspectives) in the delivery methods. When the programme manager was asked to explain how the programme contextualised leadership, her explanatory response was:

> *"…it probably sets out to do the opposite. What we are trying to do is equip people who can move across geographies and across sectors… let's do something more generic so that we can move them… so it's the opposite… it's more about developing global leaders rather than sector*

*specific…(*with regards to leaders moving across geographies and sectors*) it's not common at the moment, though that is something the business is trying to drive… so that is part of the strategic drive for doing this… We've only had one or two… but they're probably at the next level up…"* [EPM-015]

However, almost all participants had difficultly grounding the learning in the realities of current or future management roles. Thus despite the future strategic intent of moving managers around globally, there was not sufficient context to situate learning, current-tense; this was also manifest in the behavioural ambiguity and strategic disconnect, earlier in the case analysis. The desire to create global leaders was disconnected to other systemic elements of the programme design and integration.

In analysing the observations of the participants it was evident that the integration of contextualisation was not clear, indeed "*difficult to answer*" [EPP01-021], as "*it was not tailored to an industry or sector*" [EPP01-023].

"*…they simply didn't contextualise… no evidence of talking about specifics, of operations or context*" [EPP05-012]

To exclude situational leadership needs requires participants to pursue "(self) *reflection and application within your own environment*" [EPP02-035]. Such an approach makes any supervisory observation or measurement that desirable leadership development has actually occurred exceeding difficult.

Where elements of the programme were contextualised, for example the global cultural awareness workshop, the contextualisation showed promising signs of being effective:

"*…the workshop on different cultures was good…for developing an understanding for diversity, social and cultural difference…*" [EPP06-015]

"*…I got a lot from global market place (cultural workshop)… aspects about the global environment worked well.*" [EPP01-012-022]

"*…good introduction to cultures and backgrounds…*" [EPP04-033]

However, the significant weakness here was that none of the participants were given opportunities to practically apply the cultural awareness skills, as subsequent to the programme every one of them remained in the same sector and geography; nor did they demonstrate any intentions for moving globally or across sectors.

4.3.2.3 Limited future-context link

The above observation exposes a potentially fundamental inhibitor for the programme: that developmental interventions do not prepare leaders for their successive future leadership roles in the organisation. Participants are not proactively linked to post-programme promotion, and merely "*get back on the treadmill again*" [ELT-40]; thus the pursuit of career development appears to be unfinished or disjointed. In fact, the content of the programme is so disjointed from post-programme realities that:

> *"…when they get back to their daily jobs… what doesn't exist is this culture of support… back in to the day to day fire-fighting jobs and it either gets diluted or lost completely."* [ELT-40]

These observations demonstrate a lack of real-world, integrative future application of systemic leadership development. The organisational leadership realities of participants post-programme is different to the aspirations of the programme content. There is little demonstrable future-context application in the programme design.

Any future-context developmental intentions, even with regards to subsequent global assignments for the leaders, does not appear to materialise. The reality is that managers remain where they are. This factor is perhaps correlated with the strategic disconnect factor of influence discussed earlier in the chapter; that the organisation is not strategically-minded and systemically-orientated to deliver on such leadership development aspirations.

The future-context gap, which is potentially absent in this programme, might be developing situated leadership skills and behaviours appropriate to the 'leadership gap' discussed in the strategic disconnect factor [ELT-006]. Currently, the participants are given access and experiences [EPP01-026; EPP06-046] with senior leadership of the organisation and are encouraged to think "*that bit more strategically*" [ELT-014] through these developmental experiences. However, they are unable to apply this learning post-programme, and find themselves back in a 'leadership reality' full of alternative challenges. This would perhaps suggest there is a missing stage in the leadership development, where mid-level managers are equipped to display more effective leadership within their current contextual role and/or immediate future contextual role, rather than far-reaching senior leadership competencies.

Catalysts – Contextualisation

4.3.2.4 Corporate synergy focus

The analysis identified a potential contextualisation catalyst in corporate synergy focus. The programme owner referred to this as "*a commitment to focus on corporate synergy and transferable skills*" [EPO-015]. The aim of this commitment is to develop a global business where managers move laterally and horizontally anywhere in the world. Despite the fact that in reality this is not actualised, the commitment is nonetheless extant, not least in an aspirational sense, and likewise reflected across the participants' reflections on programme intent.

4.3.2.5 Systemic leadership development observations

The analysis of *Element Two: Contextualisation* uncovered several potential factors of influence in generating systemic leadership development.

Despite a commitment from the programme management team to foster a global orientated corporate synergy focus, which has the potential to generate systemic leadership development, across social awareness, collective synergies, cultural development and forging of social structures. However, the analysis revealed a pragmatic discord between the aspirational systemic view and how context is actually applied within the programme. Indeed, there was confusion over how to apply context within the developmental interventions. The analysis showed little connection exists with realities back in the workplace and that leadership development was ungrounded in contextual reality. This mismatch with context has the potential to inhibit systemic leadership development, as without pragmatic linkages, the organisation is failing to build on trust, goodwill and reciprocity with the participants, potentially resulting in a depreciation in leadership engagement (also see *Element Four: Impact*). The pragmatic discord may also negatively affect the organisation's ability to set strategic direction and alignments, as well as organisational development, as expectations fostered on the programme differ to the reality of career management.

4.3.3 Element Three: Performance

In this section the researcher looked to delve deep into interviewees' responses, by asking them to extrapolate value judgements alongside their reflections on how performance feedback was given to participants during the programme (see **Appendix E**).

The analysis generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.6** and subsequently discussed.

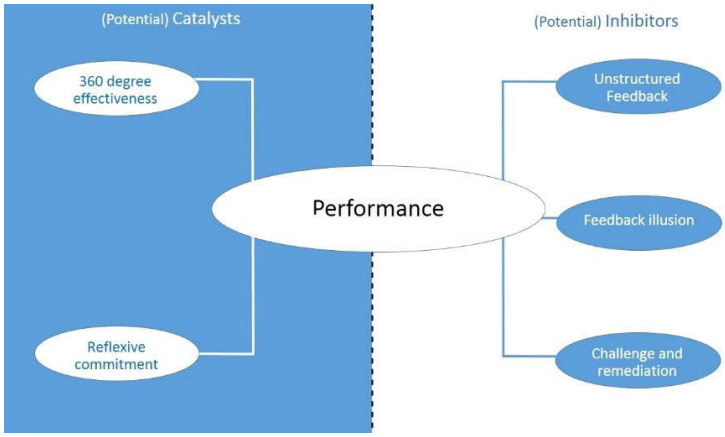

Figure 4.6 - Element Three: Performance Fi Analysis. Source: Author

Inhibitors – Performance

The analysis generated three prominent, and interconnected, potential inhibitors: *unstructured feedback*, *feedback illusion* and *challenge and remediation*.

4.3.3.1 Unstructured feedback

The analysis presented a contradictory view of how feedback was given to participants. There was a clear assumption in the programme management team that "*there is loads of feedback*" [EPO-020], with a plethora of platforms and opportunities: "*peer-based feedback… dragon's den pitch… feedback sessions… monthly one page reports…*" [EPP01-025]. The leadership trainer described the integral role of feedback during the workshops:

> *"…it's a continual thing that starts on the first day, day one and finishes on day five, so it happens throughout, so I wouldn't like to put a percentage on it, you know. I mean there's feedback after every task, there is feedback in general sessions. Where someone might say something, I would that that was a really interesting point. How would that apply to your job?"* [ELT-029]

However, when the data was synthesised to include participants' accounts, the structure appeared to be significantly less robust and effective:

> "…*formal feedback was lacking*…" [EPP02-046]

> "…*there was verbal feedback, in chats, but it required you asking! If I hadn't asked I am not sure I would have got any*." [EPP05-016]

> "…*we were left to learn and figure out for ourselves*…" [EPP06-025]

> "…*the feedback was not so much about the leadership bit*…" [EPP05-23]

These statements reveal a less structured approach to providing performance feedback for participants, and suggests that formality, guidance on personal development actions and contextual linkages to leadership behaviours were not explicitly integrated. There is also - contrary to a systemic development approach - a self-orientated, egoistic orientated learning process:

> "…*about 80% respond to feedback… those that are more business-like and confident… and have career drive*…" [EPM-031]

This self-orientated learning process is linked to the concept that the leadership development programme was an "*experiential programme… less about managed change…"* [EPM-032]. However, this unstructured and undirected learning approach potentially leads to the injudicious assumption that feedback is naturally occurring and that it has a positive effect on participants' performance; when in fact it might not.

4.3.3.2 Feedback illusion

The analysis revealed a misguided assumption amongst programme management that feedback was frequent and was of high-value. The leadership trainer outlines this assumption:

> "…*they can continually seek feedback from the people they engage with and that's one of the beauties of the programme is that once they have made that connection with senior people they can then get feedback from them not just on the project they have been pursuing but on how they engage and connect with that kind of thing… So in terms of* (how much feedback)*, I wouldn't like to give a percentage, I would imagine it is pretty high.*" [ELT-025]

> *"I think that it lasts forever. They get a lot of value out of it."* [ELT-33]

Conversely, when participants' statements were included they presented a different picture of the frequency and value of the feedback. The self-orientated participants expressed a different

perspective where "*those that sought more feedback benefitted*" [EPM-021]; "*I had to seek it out, not volunteered*" [EPP03-035]; "*…it is because I asked* (for feedback)*… it was good I drove that…*" [EPP05-020]. These accounts support the observation that it required self-assertiveness and self-directed drive to engage with feedback in order to benefit from the provision. Without that drive several participants experienced "*…little interaction with my mentor. No face time. No insight into behaviour or thinking…*" [EPP07-0111]; "I didn't get performance feedback" [EPP04-023]; and "*…I don't remember much about feedback, in terms of learning experience... it would be better if there was more… there was less than enough…*" [EPP06-22].

This contention reveals an illusory assumption amongst programme management that feedback is naturally occurring and having a positive influence on the participants. When in fact, there may be a distinct "*…lack of quality…*" [EPM-022], and a terminal position where the organisation "*doesn't see the outcomes or change from feedback*" [EPM-020]. This 'hit and hope' approach to performance feedback makes it "*difficult to answer if it is having any effect on future performance*" of the participants [EPP01-034].

4.3.3.3 Challenge and remediation

The analysis also revealed a lack of challenge and remediation in performance feedback. This is possibly linked to a philosophical approach expressed by the leadership trainer:

> "*What we do is try to focus on the positives. We try to analyse success rather than difficulty and the reason we do that is when sometimes people work on that sense it begins to eliminate their weaknesses. So we have this mind-set of looking for what works, as opposed to looking for what doesn't. So that always has an influence on the sessions we run."* [ELT-32]

This approach is based on the assumption that "*people are actually focused by it* (positive feedback); *saying I am good at this and good at that*" [ELT-32]. This is valid if the performance of the participants is perceived to be good and consistent with performance expectations and desired outcomes; or as one participant stated it: "*don't worry if you're doing great*" [EPP05-018]. However, it is quite unsuited to challenging particular issues for remediation in participant performance:

> "*What we do find is that people will shy away if given bad news. Now that does not mean to say that it is not there but they will almost do a three mile detour to get to that real point*." [ELT-030]

This contention exposes limitations in the feedback approach, as one participant felt:

"*The feedback was too fluffy… I wanted some direct feedback, and I asked for it… I wanted positive criticism to up my game. I wanted hard lessons… A guy on the course got a hard lesson, about the way he was behaving… it changed him totally… It was a humbling experience for him, but it made him much better…*" [EPP02-039]

This does not necessarily refer to providing feedback regarding bad behaviours or problems; as the same participant identified:

"…feedback only with a problem was not good… wanted more of a critique… how are they going to use it (leadership) *moving forward? How is it linked?"* [EPP02-051]

This positive criticism or critique refers to feedback that is remediating; which invokes some progressive change, moving forward; by acquisition or adjustment of some particular behaviour or skills (Avolio, 2005). It is this form of feedback, Avolio (2005) argues, which generates productive conflict; allowing significant change and development to occur. As to whether feedback of this sort is being generated in the programme, the participants' responses were unequivocal:

"…*not a lot because no feedback about changing anything*" [EPP02-053]

"…*the feedback was not challenging at all…*" [EPP05-021]

"…(feedback was) *very limited and little, no challenge on performance…*" [EPP07-011]

"*I don't think the feedback was challenging… more at the early stages…*" [EPP06-024]

Catalysts – Performance

The analysis generated two prominent potential catalysts: *360 degree effectiveness* and *reflexive commitment*. These two catalysts are discussed below.

4.3.3.4 360 degree effectiveness

The analysis revealed that multi-rater feedback (360 degree) demonstrates a potential efficacious catalyst for systemic leadership development; as it promotes a strong collective relational orientation and socially-aware and -responsive approach to leadership development. The approach during the programme hinges around participant interaction during the workshops:

"What we normally do is that we pull a couple out of the group and get them to observe as well because we see observation as quite a key role in the development of leadership. From that we then begin to get comfortable in giving each other feedback. So that continues through the whole workshop. We then have a session where they give feedback on a one to

one basis. So everyone in that group will give a team member five or ten worth of feedback. That's all based on what they have seen over the week." [ELT-025]

Both the programme owner [EPO-031] and programme manager [EPM-029] recognise the significant value of 360 degree feedback for participants, and they see it as forging openness and reflexivity in participants. This is something several participants recognised is being the most important and valuable sources of individual feedback [EPP01-025; EPP03-033]; "*…an opportunity to seek feedback from peers…*" [EPP03-033]. These "*peer review comments*" [EPP01-031] have both authority and validity for recipients [EPP01-025]. Individual development issues are "*brought to their attention and reinforced*" [ELT-034].

4.3.3.5 Reflexive commitment

The analysis also revealed genuine commitment and willingness amongst participants to reflect and adjust their own ideas and behaviours based on feedback. This is reflected in the fact that all of the participants expressed a desire to be challenged through feedback. They actively "*sought it out*" [EPP03-039] and wanted "*hard lessons*" [EPP02-039] in order that they might experience significant change. Several participants showed a willingness to receive challenging feedback if it meant significant learning would occur; with one providing a valuable insight into why: "*…it is uncomfortable when you are learning the most…*" [EPP03-052]. For this particular participant, the motivation behind this commitment to change was essentially about "*…knowing more about self*." [EPP03-048]. One participant reflected on this commitment to change by listing aspects of their own leadership which had improved through feedback: "*I have improved in areas… task-focused; soften approach; stop and pause…*" [EPP01-033].

4.3.3.6 Systemic leadership development observations

The analysis of *Element Three: Performance* uncovered several potential factors of influence in generating systemic leadership development.

The analysis revealed a commitment amongst the participants to have their performance on the programme critiqued and to receive positive criticism and guidance on how to adjust and change their leadership approaches. This is potentially a positive catalyst for systemic leadership development as it represents the forging of commitments, cooperation and goodwill within the participants towards the expectations of organisational leadership. This in turn has the potential to promulgate systemic social and organisational imperatives and alignments.

Another potential efficacious catalyst for systemic leadership development was the application of multi-rater (360 degree) feedback; as this performance feedback method promotes a strong collective relational orientation and socially-aware and -responsive approach to leadership development.

The analysis also revealed several potential inhibitors of systemic leadership development, such as an unstructured approach to performance feedback, where the onerous was on the participants to harvest feedback, with little or no structure with regards to formality, guidance on personal development actions and contextual linkages to leadership behaviours. This self-orientated and -driven learning process is potentially contrary to a systemic development approach as it does not systematically align individuals to systemic social and organisational imperatives, nor does it foster a culture of collective alignments and commitments, but rather an egoistic, local development focus. These same observations may be consistent with another potential inhibitor - the illusion that feedback was naturally happening - which may have a similar negative effect on systemic leadership development across collective synergies and organisational development imperatives.

The potential inhibitor of a lack of challenge and remediation in performance feedback may facilitate negative effects by allowing misalignments and misunderstandings in the participants' notions of leadership and organisational imperatives. Negative behaviours, such as egoistic development focus, acutely manifest through 'prima donna' syndrome, or toxic leadership - which are unconducive with systemic leadership development - may be unchecked and allowed to continue back in to the organisation.

4.3.4 Element Four: Impact

The analysis in *Element Four; Impact* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.7** and subsequently discussed.

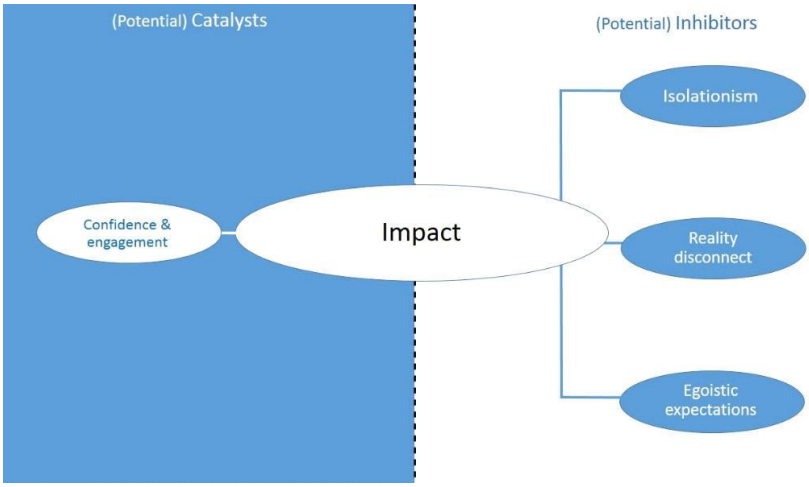

Figure 4.7 - Element Four: Impact Fi Analysis. Source: Author

Inhibitors – Impact

The analysis generated three potential inhibitors: *isolationism*, *reality disconnect* and *egoistic expectations*. These three inhibitors are discussed below.

4.3.4.1 Isolationism

The analysis revealed that several important aspects of the programme suffered negatively from being isolated. Isolated in terms of insignificant volume and lack of connectivity to other wider, systemic, aspects of the programme and organisational needs. A potentially significant factor of this isolation is the low amount of key managers in the organisation conducting leadership development. The Global HR director - programme owner - outlined the challenge:

> *"…the stuff I have been talking about really applies to a really small amount of people, maybe about 200-250 out of 28,000… so the numbers are small… we do not do, sort of, a mass development of people who are in a certain grade of employment; we do the development of people where there is a development need, and that's it… so the numbers are not large. And I can't work out yet whether if that is a problem yet or not. However I do think that, you are looking at one of the major challenges for HR and people management over the next couple years within (organisation name) there is a gap between the company that we talk about and tools and framework we have, and the company that our 28,000 recognise that they actually work for. There is a gap, no doubt about it."* [EPO-025]

These observations uncover a key issue for generating systemic leadership development: are there enough managers in the organisation systematically developing desirable, and appropriate, leadership behaviours in order to make an impact on delivering collective synergies, social alignments and organisational development?

Coupled to the potential inhibition of insufficient numbers of mid-level management conducting leadership development is the possibility that those conducting leadership development are spending insufficient amounts of time and effort on the programme. If Day's (2010) indication that 10,000 hours would be an indicative amount of time for leadership development, the participants fell vastly short of this target. Several participants' responses observed:

> "…*not enough time… not very much impact…*" [EPM-035]
>
> "…*this is the only training I've done on leadership and behaviours*…" [EPP01-040]
>
> "…*not a lot; after ten years, this is my first thing*…" [EPP03-056]
>
> "…*some people were over loaded in the first place…given no slack at all…couldn't contribute because they had too much to do with the day job…" [EEP03-069*
>
> "…*demands of people on it were huge… overbearing at times*." [EPP06-039]

Another inhibiting factor appeared to be the programme had little connectivity, both within the programme elements, and externally with the organisation; as described by the leadership trainer:

> *"…what I don't see is the end result which actually pops out at the end of the year and is something which would be interesting to see. I can tell where people are in terms of skill development by the end of the week. All I get is the noise which comes out of the program… Perhaps it is about well this group didn't do well in the Dragon's Den etc…"* [ELT-035]

Indeed, the potential inhibition generated though isolating aspects of the programme may be a reason for various expressions that the programme had very little to no impact on individuals and the organisation. Further explanations for why such little impact was recognised by the interviewees may also be found in the next potential inhibitor: a reality disconnect.

4.3.4.2 Reality disconnect

The analysis revealed a lack of real-world connectivity between participants' experiences on the programme and leadership in the workplace. This reality-disconnect potentially inhibits meaningful (SAEI leadership perspective) positive impact on individuals and the organisation due to pragmatic irrelevance and inconsistencies. The analysis showed that often learning experienced on the

programme "…either gets diluted or lost completely…" [ELT-042]. The leadership trainer summarised this disconnect:

> *"The Academy was set up with good intentions and the programme and Leadership and what happens to these people when they get back to their daily jobs is that they are back on the treadmill again and I think what doesn't exist is this culture of support and almost risk taking, almost allowing people to do things that allow them to make mistakes."* [ELT-41]

Thus, pragmatic linkages for the participants becomes less obvious and realistic; leading to confusion around the appropriation and impact of the learning. This reality-disconnect confusion is consistently found in participants' responses:

> *"Programme intent is good, outcome is not"* [EPP02-056]
>
> *"…the programme didn't deliver on expectations"* [EPP04-028]
>
> *"I wouldn't say it had an impact!"* [EPP04-026]
>
> *"…not much personal impact"* [EPP05-026]
>
> *"…none with leadership training… yes, technical, project management and safety… but no leadership training"* [EEP06-029]
>
> "(with regards to impact)…*I think very little"* [EPP06-032]
>
> *"I don't know if it had any impact on individuals or the organisation"* [EPP06-035]
>
> *"…not sure how you would measure it"* [EPP03-060]

The programme owner also recognised 'measurement ambiguity', referring to a lack of connections with real-world impact, and conceded that he had "*no empirical evidence*" [EPO-032] of any impact on the individuals or the organisation. Perhaps this disconnect is a fundamental design issue. Even one he identified himself:

> *"I don't know if there is an exact match between what we are trying to develop and what those people would look like…"* [EPO-001]

Another potential inhibitor was identified in the programme management team and wider organisational management "…not doing enough follow up…" [EPM-038] with participants post-programme. The participants felt like their efforts were wasted as they were not recognised by the organisation upon completion and their newly acquired skills were not being applied. One participant lamented:

"*…our project was brought into business where it was accepted, but not implemented…"* [EPP02-066]

This failure to follow-up was evident in the lack of promotion or career management. Promotion or job assignments were expressed as desirable products, but hey were not being delivered:

"*…stretch role as an outcome… though that is the intent, not the reality*" [EPM-037]

"*Better job after the course? Didn't happen*." [EPP03-059]

This failure to demonstrate real-world linkages for newly acquired leadership development is potentially a key catalyst for achieving meaningful impact with the programme. There should be a tangible and high profile link between attendance (effort) and greater organisational engagement (rewards). The leadership trainer recognised this:

"I suppose at the end of the day the way you would measure all this is if people are promotable, you know? …I have other clients in the resource industry oil and gas and their only real major is that people pop out of the course and can be placed in senior management positions. The Chief Executive has confidence to do something and they have confidence to do something. I am not sure that exists in this programme, but I think it's a good question actually. It's maybe something that we are missing." [ELT-037]

4.3.4.3 Egoistic expectations

Another potential negative factor of influence is the individual, egoistic expectations of the participants. The programme management team have openly espoused a strong self-directed learning approach and have emphasised that "*…it's up to the person…*" [ELT-043] what they get from it, with a recognition from the programme manager that "*…they may benefit as individual, but not as business*." [EPM-042]. This egoistic focus is potentially inhibitive for systemic leadership development as it promulgates egoistic motivation amongst organisational leaders and potentially reasserts a short-term leadership focus; 'benefits for me not benefits for all'. This observation was manifest in one participant's comment:

"*I don't know if it had any impact on individuals or the organisation, but the HiPo list… this is evidence… by remaining on the list!"* [EPP06-036]

Self-centred expectations - of efforts, rewards and individual career progress - might lead to an irreconcilable conflict of expectations versus reality. Resulting in dissatisfied leaders. The programme management team recognise this: "*…we need to look at retention… are we progressing their careers?*"

[EPM-039] with "…*promises of "grade escalation*" [EPO-030]. In reality they have "*no visibility of this*" [EPM-041].

The subsequent result of this conflict is manifestly negative for the organisation and systemic leadership development:

> "*…most people have now left!"* [EPP06-038]
>
> "…*they invest in people who are leavers*" [EPP02-062]
>
> "…*having recognised their value, they leave*…" [EPP02-063]

Catalysts – Impact

The analysis identified a potential catalyst in participants' confidence and engagement. This catalyst is discussed below.

4.3.4.4 Confidence and engagement

The analysis revealed clear evidence that participants had experienced an increase in personal confidence with regards to leading within the organisation. They also demonstrated a commitment and enthusiasm about engaging with greater leadership opportunities and responsibilities:

> *"I feel ready to step-up succession… I have greater confidence… just promote me!"* [EPP02-064]

Evidently the desire was there amongst participants for greater leadership experience and more active involvement within the organisation. The issue for the organisation is having the connections and systems in place to deliver on expectations.

4.3.4.5 Systemic leadership development observations

The analysis of *Element Four: Impact* revealed several potential factors of influence in generating systemic leadership development. The analysis showed that low volumes of management in the organisation were conducting leadership development - either on this course or any other - and this lack of quantity makes systemic leadership development challenging, as it inhibits the collective leadership of key systemic organisational development factors like setting strategy, direction and alignments; and collectively promulgating social and organisational imperatives. Also, fundamentally, it inhibits the ability to develop social awareness within mid-level leadership across the organisation, where collective synergies and social structures are potentially not ingrained sufficiently, to a level that they stick.

There was also a potential inhibitor in developing systemic leadership in the programme's apparent failure to demonstrate real-world linkages for the newly acquired leadership skills and behaviours. Participants felt their efforts were somewhat wasted as they were not recognised by the organisation and subsequently rewarded with greater leadership opportunities. This potential inhibitor may have a negative effect on the individual and organisation forging and maintaining commitments, based on trust, goodwill and reciprocity. This is also linked to the creation of organisation-wide social structures and networks; using the newly developed leaders as key network enablers of direction, alignments and imperatives.

Another potential inhibitor lies in the egoistic development orientation of the programme; which perhaps inadvertently has resulted in an expectations-reality conflict, which leads to disgruntled and dis-satisfied leaders departing the organisation. The loss of these leaders presents a real challenge in systemic leadership development, as collective synergies and social structures and process are directly affected, as the continuity and trust is broken. It also provides particular challenges for senior management promulgating organisational development messages, as the key protagonists keep changing, with the resultant loss in leadership development. Finally, this phenomena undermines the collective orientation of the organisation, looking for long term impact and development.

However, it was recognised that a potential catalyst exists in the participants' apparent increase in personal confidence and desire to assume enhanced leadership responsibilities within the organisation; systemically this demonstrates commitment and cooperation with moving the organisation forward.

4.3.5 Element Five: Values Integration

The analysis in *Element Five: Integration* generated some important potential catalysts and inhibitors. These are demonstrated below in **Figure 4.8** and subsequently discussed.

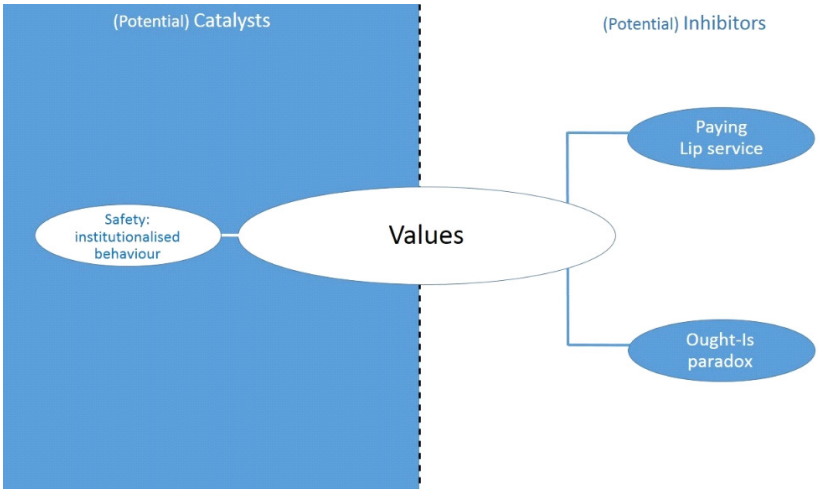

Figure 4.8 - Element Four: Values Integration Fi Analysis. Source: Author

Corporate artefacts revealed the organisation had four corporate values:

- **Sustainably delivering excellence to customers**: through exceeding the expectations of clients and other partners; thinking sustainably, for the long term; and being passionate about success.
- **Believing in people**: investing in training and development; whilst promoting team work and sharing of knowledge and best practice; and recognising the power of diversity.
- **Never compromising on safety**: protecting and supporting employees and anyone working in partnership; and commitment to continuous improvement.
- **Acting with integrity**: being reliable, trustworthy and fair; showing respect; and commitment to delivering on promises.

Whilst looking at how these values are integrated into the programme the analysis generated two potential inhibitors: *paying lip service* and *ought-is paradox*. These two inhibitors are discussed below.

Inhibitors – Values

4.3.5.1 Paying lip service

Given the high profile nature of the corporate values - corporate strategy documentation, shareholder publications, website profile, management narratives, programme documentation - the analysis

showed a degree of merely paying lip service to them, without appropriate pedagogical thought as to their development and application; either amongst the programme management team or participants.

Despite wishful assertion from the programme owner that "…*they* (participants) *believe the values*…" [EPO-035], and that programme literature has provided the corporate values "...*in the notes for every programme*…" [EPM-044]; both of these observations do not lead to the assumption that they are being explicitly developed on the programme.

The analysis demonstrated a remarkable nescience regarding corporate values; with not a single participant being able to recall and recite the four values.

The leadership trainer - who is tasked with integrating them into the workshops - was unable to recall the values:

> "*I go into the website before we even start this and reminded myself of what they are, you know… I am almost in a different planet most of the time to remember everything*." [ELT-045]

This lack of serious engagement with the corporate values is possibly due to the "…*values* (being) *too complex, no one remembers them*…" [EPM-043]. Furthermore, the lack of clear direction and integration of the values into the programme was very evident in the contradictions and confusion of the interviewees' responses:

> "*I didn't notice them*." [EPP05-030]
>
> "…*I don't know values…they keep changing*." [EPP03-062]
>
> "…*they are a checklist*…" [EPP04-030]
>
> "…*they only focus on customers…*" [EPP01-042]
>
> "…*one is about behaviour! Behaviour is interesting as it tends to be about other statements."* [ELT-045]
>
> "…*the corporate values are covered elsewhere*…" [EPP01-044]

These observations show a distinct lack of clarity and systemic application of values development. They also hint at an assumption from the programme management team that the values are implicitly integrated into leadership development, however, this is not reflected in the experience of participants:

> "…*they are not referenced to*…" [EPP02-067]

"…*no evidence…no 'direction' on values*…" [EPP05-032]

Even when analysing acknowledgements that values may have been represented on the programme they reveal more inconsistency and confusion:

"…*they were embedded in the course*…" [EPP03-061]

"…*embedded, but indirectly*…" [EEP02-068]

"…*embedded but not visible*." [EPP06-041]

"…*not deep*…" [EPP04-029]

"…*not much*…" [EPP05-029]

"…*they are not drilled in*…" [EPP02-070]

"*they are not making a difference*…" [EPP03-064]

"…*not terribly effective in integrating the values in* (programme name)…" [EPP04-032]

"…*don't recall this being a major theme*…" [EPP07-013]

These conflicting comments show that despite the huge significance of corporate values in dictating organisational leadership behaviours, they are not as integrated and explicitly developed on the programme as the programme management team presume, or wish, them to be.

The analysis also revealed ambiguity regarding how and where corporate values fit in with regards to leadership development. There appeared a wishful assumption that everyone intuitively shares and demonstrates the values:

"…*the values are seen as a given; that we do that...otherwise we couldn't have been nominated for the programme*…" [EPP02-069]

"…*all had values beforehand*…" [EPP03-063]

However, the programme, and the wider organisation, has no way of assessing or qualifying what it means to demonstrate the values beforehand, as they are not in any way formally or informally assessed or reviewed them. This lack of a systematic approach to incorporating values into leadership behaviours is:

"…the bit that's missing I think is that if we were translating those values into expectations… if say you were joining the business as a new country manager, I would be very clear about my expectations of you delivering safely… if I were going to talk about my expectations of you as

a manager with regards to people and believing in your people… I think that is the bit we are missing. And that is contributing towards the gap…" [EPO-036]

Furthermore, there is an apparent contention around what the values physically are and whether in reality it is "…*more about wider leadership behaviours*…" [EPP01-043] which dictates how leaders are "*expected to behave*" [EPP06-042]. Indeed, the programme manager explicitly states that it's essentially all about "…*High Performing Leadership Behaviours (HPLB) of the organisation…the programme is built around those*…" [EPM-045]. However, to develop leadership towards those behaviours instead of the corporate values, essentially leads to the pragmatic reality where "*we don't live the values*" [EPM-047] and, in fact, "…*everything is about delivery in this organisation*…" [EPM-049].

4.3.5.2 Ought-Is paradox

The analysis suggested a potential inhibition in something approximately akin to *Hume's Guillotine* (Hume, 1739); here a potential conflict occurs in relation to which values and behaviours leaders ought to demonstrate versus which behaviours they actually demonstrate. Ideally, corporate values represent the sorts of behaviours leaders ought to have, but in reality:

"…*values aren't at the forefront of people's mind; they're not part of delivery*…" [EPP06-043]

In this conflict, corporate values are potentially, at most, "…*linked to selected behaviours*…" [EPP06-044], however, only those behaviours which are linked to the operational delivery and performance leadership imperative are important. What *is* differs to what *ought* to be. This potentially results in leaders experiencing a pragmatic conflict between what they ought to do - from a values-based perspective - and what is being done - from an operational delivery and demands perspective. This conflict was observed by the leadership trainer:

"*What's my contribution to be and how can I make the most of it without contravening any corporate values or profit leeks. It's an interesting question because when you start to get them to think about what are the corporate values, not many of them know them*." [ELT-044]

In reality, it is only those leadership behaviours which are relevant for delivery that will be retained and practiced by the participants. The degree to which, across the participants, the *'ought'* is out-weighted by the '*is*' was discussed by the leadership trainer:

"*Some do and some don't. If we look at some do, they are in roles where they have been exposed to where there is more strategic thought than others. If you look at people who are engrossed in projects, especially projects which are not going so well, there tends to be a*

pressure, a monetary pressure which can almost conflict with this relationship between customer, client, stakeholder etc. So what ends up is that they don't manage that change process particularly well and that change process then turns into almost a conflict where they disagree and argue and things like that." [ELT-047]

This observation brings attention to the need for values to be systematically developed within the leadership development programme, incorporating real-world contextual issues.

Catalysts – Values

The analysis identified a potential catalyst in the organisation's approach to safety leadership and how this has become an effective institutionalised behaviour. This catalyst is discussed below.

4.3.5.3 Safety: institutionalised behaviour

The analysis showed a clear positive catalyst for systemic leadership development in the significant institutionalisation of safety as a core value. Safety was the only value repeatedly recognised by the interviewees. Its intrinsic link to being a leadership responsibility was recognised by the programme owner:

> "…probably the most important thing is *safety leadership. So if somebody is not demonstrably a good safety leader then they will not progress in this company…*" [EPO-001].

It also has a crystal clear link to operational delivery and performance. Without safety, operations simply cannot be successful. This clear linkage ensured that, as a value, it was unilaterally adopted and practiced by all leaders. With one participant expressing that "*40%*" [EPP04-027] of his leadership development he would be ascribed to his training in safety leadership. The relevance and importance for safety as a value is reflected in its obvious contextual and behavioural links: "*it's all about safety*" [EPM-046]. The leadership trainer-r praised this commitment:

> "*What they are particularly good at is their safety record. Safety is ingrained in everything they do and I think if they did something along with the corporate values and behaviours and I think that would stand them in good stead. As I say, safety wise, they are second to none*." [ELT-049]

The significant aspect of this corporate value is its unequivocal adoption and application across all leaders, and its considerable investment, with regards to systemic training and development across the whole organisation, with a strong contextual link and level of collective and social responsibility.

4.3.5.4 Systemic leadership development observations

The analysis of *Element Five: Values integration* revealed several potential factors of influence in generating systemic leadership development. The analysis showed that despite the significance of corporate values in dictating collective leadership behaviours, they were insufficiently integrated into the leadership development programme. This potentially inhibits the creation of social awareness across all aspects of systemic leadership development, as well as potentially not forging the right sort of collective behavioural commitments and cultural development. Instead, the programme appeared to promulgate only those leadership behaviours which are relevant for egoistic development needs and operational delivery; this potentially leads to short termism and a focus that neglects long term organisational development needs.

However, there was a potential catalyst for systemic development in the clearly successful development of safety leadership amongst organisational leadership. The significant aspect of this value is its clear adoption and application among leaders and its strong contextual links and levels of collective and social responsibility. Safety leadership demonstrates an effective systemic leadership development approach across collective synergies - with forging and maintaining commitments and engendering trust, cooperation, goodwill and reciprocity - also with efficacious organisational development - aligned to social and organisational imperatives (i.e. 'safe operations') – and cooperation and coordination across organisational social networks, where clear consistency and commitment were extant.

4.4 Case Study A - Inferential linkages to systemic leadership development

4.4.1 Extrapolating potential systemic leadership development linkages

The within-case analysis demonstrated a significant number of potential linkages between the data and systemic leadership development. During the data analysis process the researcher repeatedly reviewed audio files and written transcripts, and triangulated with observations and artefacts, identifying potential impact linkages with the systemic definition.

The table below (**Table 4.1**) demonstrates the volume of potential linkages, between the observations of the participants and the differentiated elements of the systemic leadership development definition. Identifying these potential linkages generated a degree of awareness within the researcher as to significant areas of interest for subsequent deeper analysis.

Interview Source data	Potential linkages: systemic leadership development												TOTAL
	Collective synergies					**Organisational development**				**Social structures and processes**			
	Team building	Forging and maintaining commitments	Trust, cooperation, goodwill and reciprocity	Feedback and challenge	Social awareness	Setting direction and alignment	Social and organisational imperatives	Cultural development	Social awareness	Integration with social and network systems	Fostering cooperation, coordination and networks	Social awareness	
Programme Owner	06	11	09	18	08	21	23	12	12	27	14	21	182
Programme Manger	05	17	12	25	09	26	26	15	24	38	10	33	240
Leadership Trainer	06	21	25	21	09	21	27	21	13	19	20	10	213
Participant 1	02	13	19	12	08	24	20	20	12	19	21	08	178
Participant 2	02	12	13	34	16	38	14	17	27	07	04	27	211
Participant 3	09	21	17	32	11	17	14	07	21	05	04	11	169
Participant 4	01	12	21	10	09	19	13	07	17	04	03	10	126
Participant 5	01	03	14	24	11	29	15	19	12	18	17	10	173
Participant 6	03	19	16	13	09	20	20	11	19	09	03	14	156
Participant 7	06	07	04	09	04	12	10	08	06	10	09	04	89
TOTAL	41	136	150	198	94	227	182	137	163	156	105	148	1737

Table 4.1 - Potential Linkages: Systemic Leadership Development. Source: Author

The volume of potential linkages does not indicate whether the comments included positive or negative statements regarding efficacy, nor whether the respondent explicitly identified factors of influence; rather indicates possible inferential linkages to the systemic leadership development definition, as identified by the researcher when interpreting the data. Analysis of whether the certain potential linkages did indeed have positive or negative influence on systemic leadership development were analysed in detail in the case study analysis within this chapter.

However, as the table above demonstrates, the analysis showed significant potential linkages within:

- *Feedback and challenge,*
- *Setting direction and alignments,*
- *Social and organisational imperatives,*

- *Social awareness with regards to organisational development,*
- *Integration with social and network systems,* and
- *General Social awareness across wider social structures and processes (pan-organisation)*

Thus, the factors of influence analysis within this chapter delved into these potential linkages in detail, and identified some possible reasons for the volume of references in the transcript data, and what influential factors might be drawn from the analysis. These are highlighted now in the summary.

4.4.2 Summary of Case Study A: Factors of influence analysis

In summary, the within-case factors of influence analysis identified thirty factors of influence across the five elements. The factors of influence are demonstrated in **Figure 4.9** below.

These cover a broad range of systemic factors of influence and demonstrate potential inferential inductive links between cardinal themes of leadership development efficacy and the pragmatic realities of the case study. They showed that fundamental issues have the potential for significant impact. These factors provide a valuable picture and awareness for the subsequent cross-case analysis and discussion.

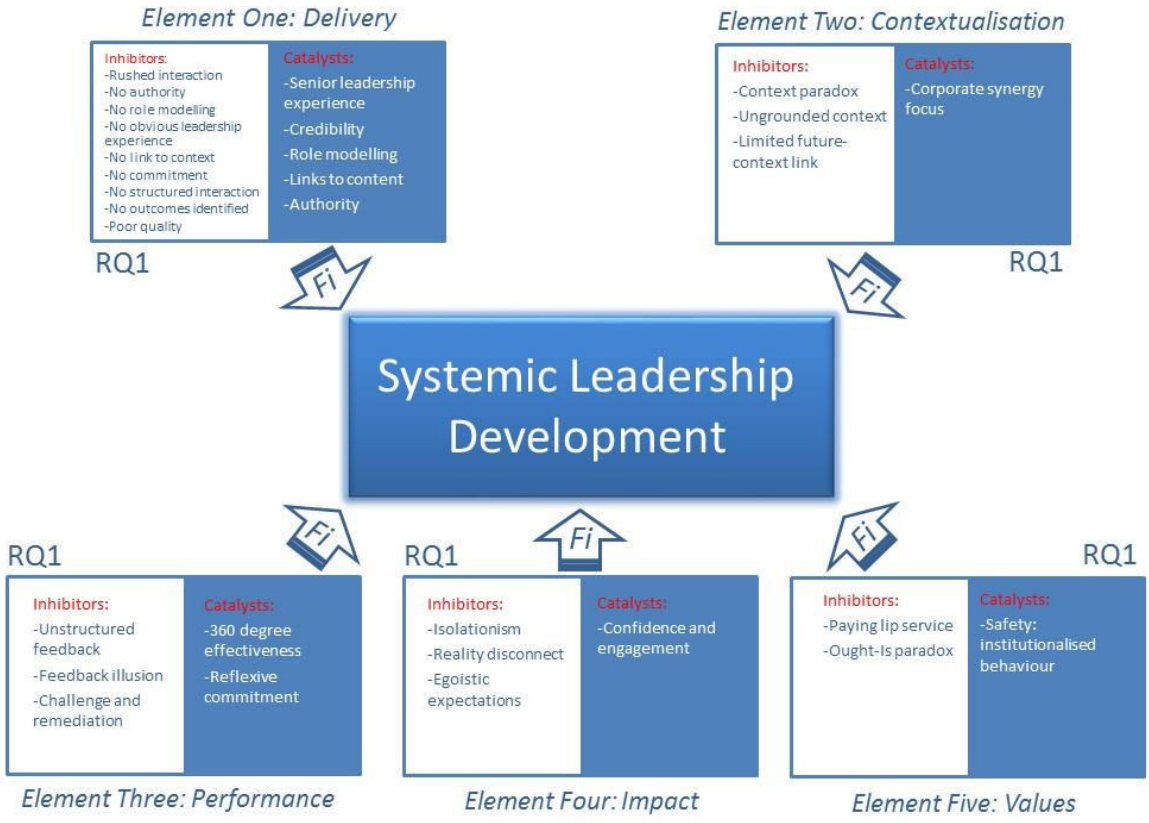

Figure 4.9 – Case A: Systemic Leadership Development Fi Model. Source: Author

The potential factors demonstrated above in the Fi model revealed both positive and negative influential factors for systemic leadership development.

The respective linkages to which aspects of systemic leadership development they potentially affect is demonstrated below in **Table 4.2**. The potential inhibitors represent possible negative effects; and the catalysts potential positive effects.

This table clearly shows a potentially significant array of influencing factors for generating systemic leadership development.

The findings of this case should not necessarily be generalised to other energy organisations based on the data alone. However, the Fi model demonstrated to be an effective case study tool for analysing the emerging observations across the five elements. Thus, the analytical model was not altered before being applied to the other case study and validation study.

The following Parts of this chapter go on to review the findings from Case Study B and the Validation Study and then to conduct cross-case discussion.

Element	*Fi* Inhibitors	*Fi* Catalysts	Influenced aspect of systemic leadership development											
			Collective synergies					Organisational development				Social structures and processes		
			Team building	Forging and maintaining commitments	Trust, cooperation, goodwill and reciprocity	Feedback and challenge	Social awareness	Setting direction and alignment	Social and organisational imperatives	Cultural development	Social awareness	Integration with social and network systems	Fostering cooperation, coordination and networks	Social awareness
Delivery	Rushed interaction			X	X		X				X			X
	No authority					X		X	X	X		X	X	
	No role modelling				X				X	X	X			
	No obvious leadership experience					X					X		X	
	No link to context			X		X	X	X	X		X	X	X	X
	No commitment				X	X		X		X		X	X	
	No structured interaction				X	X			X	X		X	X	
	No outcomes identified			X		X		X	X		X	X		
	Poor quality			X	X	X	X	X	X	X	X	X		
		Senior leadership experience		X	X	X	X	X	X	X	X	X	X	
		Credibility		X	X	X		X	X					
		Role modelling		X	X	X		X	X	X				
		Links to context	X	X		X	X	X	X		X	X	X	
		Authority			X	X		X	X					
Contextualis -ation	Context paradox				X	X	X	X			X	X		X
	Ungrounded context				X	X	X	X			X	X		X
	Limited future-context link				X	X	X	X			X			X
		Corporate synergy focus	X	X	X		X		X		X		X	X
Performance	Unstructured feedback					X		X	X		X			
	Feedback illusion					X		X	X		X			
	Challenge and remediation		X	X	X	X								
		360 degree effectiveness		X	X		X	X	X		X			
		Reflexive commitment		X		X	X				X			X

Element	*Fi* Inhibitors	*Fi* Catalysts	Collective synergies					Organisational development				Social structures and processes		
			Team building	Forging and maintaining commitments	Trust, cooperation, goodwill and reciprocity	Feedback and challenge	Social awareness	Setting direction and alignment	Social and organisational imperatives	Cultural development	Social awareness	Integration with social and network systems	Fostering cooperation, coordination and networks	Social awareness
Impact	Isolationism						X	X	X		X	X		X
	Reality disconnect			X	X		X		X		X	X	X	X
	Egoistic expectations		X		X		X	X			X	X	X	X
		Confidence and engagement		X							X			
Values	Paying lip service			X			X		X	X	X			X
	Ought-is paradox											X		
		Safety: institutionalised behaviour	X	X	X		X	X	X	X	X	X	X	X

Table 4.2 - Case A - Systemic Leadership Development-Fi Analysis: Aspect Linkages. Source: Author

PART TWO – WITHIN-CASE STUDY ANALYSIS (CASE STUDY B)

4.5 Introducing Case Study B: Mid-Level Military leadership development Programme

Part Two will discuss findings from the research within-case analysis, covering organisational leadership and cardinal themes of leadership development; looking at which factors of influence, through applying the Fi conceptual analytical model, potentially generate systemic leadership development.

4.6 Case Study B – Understanding Organisational Leadership

As with Case Study A, it was important to generate a knowledge and understanding of what organisational leadership meant to the interviewees and their perspectives in the data. During the interviews, using the same protocol as the previous case, each of the participants reflected on what sort of leadership was required of leaders within the organisation. As with the previous case, the data analysis revealed various areas of divergence and confusion across personal interpretations.

The data analysis revealed some important potential factors of influence for understanding organisational leadership. **Figure 4.10** shows the respective emergent analytical factors. These are subsequently discussed.

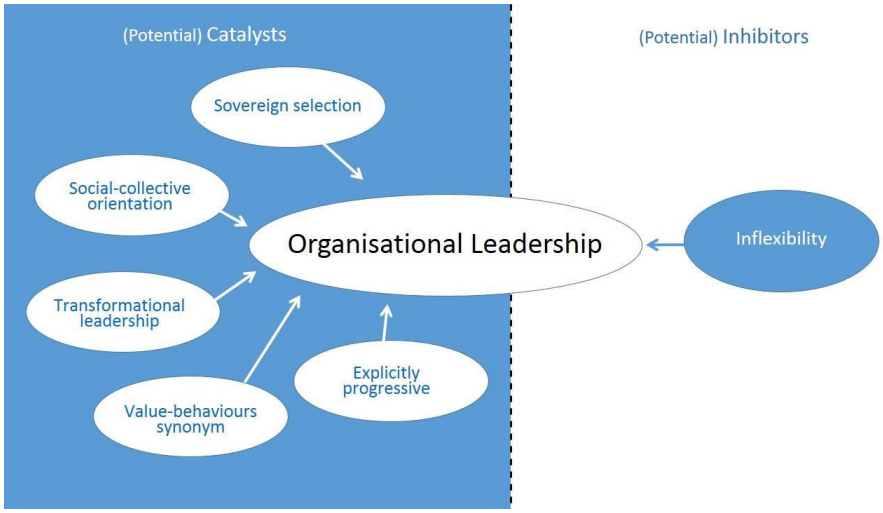

Figure 4.10 - Organisational Leadership Fi Analysis. Source: Author

Inhibitors – Organisational leadership

4.6.1 Inflexibility

The analysis revealed a certain degree of rigidity in collective notions of organisational leadership within participants. These notions were explicitly referenced by the programme manager as being of

considerable long-standing: "*two hundred years in the making*" [MPM-063]. It was inferred throughout the participants' reflections and the inherent design of the programme that those notions are an archetype, with which developing leaders must aspire and conform to. There is little reflexivity in this archetype; leaders must undergo metamorphosis or risk being removed: conform or leave. This rigidity might be seen as a potential inhibitor for the assimilation of individual idiosyncrasies or novel talents, beyond a prescriptive model. Indeed, observations suggest that the British Army notion of leadership is rather too inflexible to allow for radically contingent application. Furthermore, this aspect was recognised by the programme owner who acknowledged that the army was "*pretty good, but not perfect*" [MPO-012] at developing leadership after the archetype.

It must also be noted that this potential inhibitor may paradoxical have the benefit of generating systemic leadership development; where unity and consistency breed shared, known, behaviours and expectations; thus potentially generating systematically collective synergies and social structures. The analysis in this chapter would suggest this to be the case.

Deeper exegesis regarding the attributes of the archetype are discussed below in the potential catalysts.

Catalysts – Organisational leadership

4.6.2 Sovereign selection

The analysis clearly acknowledged the vital role selection plays in the identification of potential mid-level leaders. At all stages, huge multimodal emphasis is put on the robust and exhaustive selection processes; this generates a palpable, and often explicit, recognition that participants on the leadership development programme are without doubt *les crème de la crème* of the organisation; hand-picked for participation. Indeed, just passing the selection process was regarded by most as a considerable success.

The selection process is:

> *"…a rigorous three days of continual assessment… like a mini version of the programme … with the final assessment and report linked directly to the ten leadership dimensions… which are the core behaviours assessed in the main programme."* [MLT-016]

The entry standards expected of potentials for the selection process are extremely high and demands candidates demonstrate "*prior understanding of leadership*" [MLT-001] and "*desire for responsibility*" [MLT-002]. These issues are identified early on in the process where the selectors build a "*profile on each of the candidates, based on their application form submissions, personal statements and*

performance during the initial interview… the expressing an interest stage… this profile is then carried through into the three-day selection board process…." [MLT-015].

The candidates who are invited to attend the selection process - and as many as two in five candidates who express interest are not invited to engage in the process - are subject to a gruelling three-day continuous assessment of cognitive and physical capabilities, involving psychometric tests, simulated leadership exercises, multiple interviews and written assessments. At all stages the activities are assessed by senior leaders of the British Army, who have been through the process themselves, as well as vast experience of other leadership development programmes within the organisation. A key role they have is quality assurance, or "*dealing with breaches*…" [MPM-007]; where candidates must be diligently observed and validated for suitability to progress. The process is extremely challenging and rigorous; reflected in the 55 percent success rate for participants going beyond the selection process.

An obvious outcome of this rigorous selection process is a strong sense of merited superiority and exclusivity within successful candidates; a sense of individual and collective sovereignty – 'we are the best; we've all been through the same experience to get here and we deserve it'.

4.6.3 Social-collective orientation

The analysis revealed a strong social-collective orientation within participants' notions of organisational leadership and how this is integrated into the leadership development programme.

The programme owner explicated this orientation in his definition of organisational leadership:

> "…*to a common purpose: inspire.*" [MPO-001]

This explicitly identifies the tripartite theoretic nature of leadership: a union of leader, team and task (Adair, 1973). This notion situates leadership within a social context and invokes a transformational leadership application (i.e. inspirational motivation). The programme owner further extracted this idea in an observation that organisational leadership is "*all about group cohesion; getting a group of people to do something*" [MPO-002]. This further supports the situating of leadership within a social-collective paradigm. Such notions are entirely consistent with both a SAEI perspective of leadership and systemic leadership development; which desires collective synergies and the construction of social structures and processes.

This SAEI and systemic view is fundamentally integrated into the programme design, as the leadership trainers – all internal mid-level leaders within the British Army - represent the environmental and social needs and realities of the organisation: with developmental interventions being "…*informed by experiences*…" [MPP01-002]. This is seen as being "*very effective… as it shows 'how do they do it' on*

operations… we have seen this works very well… the after action reviews demonstrate this." [MPM-006]

The environmental and social needs and realities are then simulated through extensive scenario-based exercises, where programme participants are given leadership responsibilities over their peers, and through group-based activities, stretched and tested. This approach is seen as being "…*the best way… using command appointments on exercises... the students can never experience enough of them… as these reflect real-life*!" [MLT-012; MLT-013]

One of the essential elements of this approach is that leadership is developed collectively, in a social environment, where, as one programme participant reflected:

> "…*it's all about peer mentoring… getting there together… we are learning and developing with others*…" [MPP06-004]

Another aspect of the social-collective orientation is the notion that organisational leadership is essentially rooted in the service of others. The motto of the case study institution reflects this: "Serve to Lead". This involves organisational leadership being about "*leading by example*" [MPP03-003] and "…*always have high standards*…" [MPP02-002]. Leaders must have "…*a sense of humour and humanity*…" [MPP05-002] and the "…*courage, physical, where 'we can do it', and moral 'there are limits to what should be done*" [MPP07-003]. The emphasis is on doing what is right for others, not just for yourself; about being altruistic and selflessly committed to the collective, even if this is "…*against the societal trend even*…" [MPO-009].

Indeed, this emphasis was prominently represented in the views of the programme participants:

> "…*they showed me that it was all about looking after people… the welfare of the subordinates… of others*…" [MPP05-008]
>
> "…*they* (instructors) *certainly look after us... A sense of well-being… they are good for us*…" [MPP06-007]
>
> "… *it's all about understanding and representing your subordinates*…" [MPP02-001]
>
> "…*key message; you are leading a team not just yourself*!" [MPP04-010]

4.6.4 Transformational leadership

The analysis also revealed evidence of transformational leadership. Paramount amongst these was the importance of *idealised influence* (Burns, 1978; Bass, 1985; Bass & Avolio, 1993):

"…*set example, paramount*…" [MPM-001]

"…*behave consistency with example*…" [MPM-005]

"…*lead by example*…" [MPP03-003]

"…*the training is less important than the example*…" [MPP06-003]

Furthermore, setting an exemplar of social-collective orientated leadership must be maintained with "*consistency*" [MPP01-003]; meaning that leaders must "*…always have high standards…"* [MPP02-002]. This exemplary conduct is hinged on leadership credibility which focuses on demonstrating "*professional competencies…not just technical…but through positive appearance and perception*" [MPM-002]. Leaders must be seen to demonstrate core leadership behaviours with consistency, at all times; representing the archetype for subordinates and junior leaders to emulate and admire.

The analysis showed that organisational leadership requires leaders to employ emotional intelligence (Goleman, 2006); where they are expected to demonstrate "*empathy… good communicating and listening skills… and self-awareness*…" [MPM-003]. This "*self-awareness should be all round…* (where leaders) *draw off that awareness*…" [MPP05-004]. The scenario-based exercises and collective learning experiences of the programme require self-awareness in order to be effective, and for meaningful leadership development to occur.

Another emergent transformational characteristic was *individualised consideration* where army leaders are compelled to "*understanding your subordinates*…" [MPP02-001] and to consider those needs and motivators when inspiring the team and maintaining morale. Indeed, the course literature identified this particular aspect as being vital for maintaining the fighting capability of teams, by building and maintaining morale, through leader-follower proximity and awareness.

This proximity requires leaders to demonstrate organisational values, namely *integrity* and *respect for others*, which are manifest in "…*a sense of humour and humanity*…" [MPP05-002] and where leaders "*…accept mistakes and move on…* (learning) *how you handle them*" [MPP05-003]. Mid-level army leaders must use this proximity to build respect and rapport with subordinates, where the emphasis is less on leaders relying on direction, scrutiny and management by exception (Burns, 1978; Bass, 1985), but on transformational behaviours and "*communicating authority without authoritarian behaviour*…" [MPP01-001]. The authority and integrity will be a product of influence, rather than of power.

Another transformational aspect of organisational leadership is the attendance of charismatic leadership traits. The participants' put a high significance on "*looking good*" [MPP08-004] and being a "*credible commander*" [MPP04-003]. Indeed, one participant stated that it is "*all about having*

credibility as a leader…" [MPP07-004]. This credibility was linked to "…*professionalism and standard setting*…" [MPP08-001], "…professionalism… looking like a leader…" [MPP07-002] and "…*professionally delivering the basics well*…" [MPP04-004]; but also to the "confidence" [MPP08-005] of leaders and them "…*being physically impressive*…" [MPP06-002], by virtue of displaying abilities such as:

> "…*the ability to communicate extremely well… through logic, public speaking, brilliance… and to command inspire*." [MPO-011]

The emphasis is less about technical professional competencies, rather charismatic professionalism: the ability to inspire by actions. This might involve leaders making decisions "*even without a piece of paper*" [MPO-003], yet be "*decisive*" [MPP03-001], showing "…*robustness…unflappable*…" [MPP01-004]; with a greater need to "*innovate more than implement*" [MPO-005], utilising "*trust*" of subordinates capabilities and talents through "*mission command… which is essential*" [MPO-010].

Furthermore, the programme itself exhibits transformational leadership: "*it draws out an example*…" [MPP05-005]. The central tenet of the programme "*is all about value-based leadership… not just following civilian trends*…" [MPP08-003]; indeed, many of the values promulgated by the programme go "*against the societal trend even*…" [MPO-009]. In this sense, it is deeply transformational.

The analysis also showed evidence of transformational leadership practiced by the programme staff:

Idealised Influence (Bass, 1985):

> "…*the commandant sets standard and example of leadership*" [MPO-015]

Inspirational Motivation (Bass, 1985):

> "…*they* (instructors) *are inspirational and very effective*…" [MM01-007]
>
> "…*they* (instructors) *are inspirational and very effective at developing leadership in us*…" [MPP04-007]

Intellectual stimulation (Bass, 1985):

> "…*they* (instructors) *got across the difference between technical professionalism and leadership*" [MPP05-006]
>
> "…*they* (instructors) *showed an autocratic approach is unnecessary and doesn't work"* [MPP05-008]
>
> "…*two elements: the physical and cerebral leader: faraday and military*…" [MPP07-005]

Individualised Consideration (Bass, 1985):

> "…*they* (instructors) *certainly look after us… a sense of well-being… they are good for us*…" [MPP06-007]
>
> "…*they* (instructors) *were very approachable*" [MPP07-008]

4.6.5 Value-behaviours synonymy

The analysis also revealed a considerable synergy between desirable corporate values and leadership behaviours. This leaves diminutive contingency in interpretation and leader development. Within the British Army, it is profusely clear that "*it is about what the army expects*" [MLT-004], and that as an organisation they "…*cannot be any more firm on values and standards*…" [MLT-005]. This observation was reflected in the responses of both the programme management and participants; with all viewing leadership as being:

> "…*all about the core values*…" [MPP05-001]
>
> "…*all about respect and integrity and the core values of the army*…" [MPP06-001]
>
> "…*the core values are everything; and they get hammered home*…" [MPP07-001]
>
> "…*the only really enforced thing, the non-negotiable, was the values & standards*." [MPP08-002]

This non-negotiable rigidity of "*doing the right thing*" [MPM-004] is grounded in the "*expectations through the values and standards…*" [MPM-004]; this "*morality underpins the organisation… encapsulated in a sense of right and wrong*…" [MPO-007]:

> "…*do what you ought, not what you want*." [MLT-007]

This reveals a values-based leadership approach, which synonymises values and behaviours through "*the core leadership dimensions*" [MLT-003], and demands that leaders "…*always have high standards*…" [MPP02-002] and "lead by example" [MPP03-003]. The ten leadership dimensions must be practiced with "*consistency*" [MPP01-003] and are integrated into the "*command appointments on exercises… these exercises do the links to leadership dimensions!*" [MLT-014].

The values-behaviours synonymy exalts "…*moral courage*…" [MLT-006] and "will-power and courage (physical and moral)" [MPO-006] as the central philosophical tenet. Leaders within the organisation must behave consistently in line with this morality, or "*re-educate or are removed against moral law*" [MPO-008]. The leadership trainer expressed the importance of this process when he explained his

approach to instruction and education involves a "*zero tolerance for breach of integrity… for example, lying etc*" [MLT-008].

Another fundamental part of promulgating this aspect of organisational leadership is that values-behaviours synonymy is adequately demonstrated by the instructing staff. Evidence of this was found throughout the participants observations:

> "…*The instructing staff are inspirational and very effective*…" [MPP01-007]
>
> "…*they certainly look after us*…" [MPP06-007]
>
> "…*a sense of well-being*…" [MPP06-007]
>
> "…*they are good for us*…" [MPP06-007]

This supports the practice of transformational leadership, through idealised influence; and systemic leadership development, through fostering trust, cooperation, reciprocity within collective synergies and social structures and processes. The complementarity also reinforces social and organisational imperatives through transformational leadership.

More on this point is discussed later in *Element One: Delivery*.

4.6.6 Explicitly progressive

The analysis also showed that leadership, and its development, is explicitly progressive within the organisation. It is not seen as an individual and isolated issue; but one that is intrinsically situated within the organisational context; and is long-term focused and socially-orientated.

Organisational leadership, is seen as a progressive career-long process, where development occurs prior to any particular course and also subsequent to it:

> "…*You could literally see where your leadership would be applied subsequently*…" [MPP07-013]

The progressiveness is manifest in several factors, such as the degree of development experienced by the participants, in terms of start-state and end-state. One participant reflected on this point succinctly:

> "...*there was lots of new learning… and through this I definitely developed as a leaders… without doubt*" [MPP07-006]

Another progressiveness factor was the significant integration of context and environmental factors in the programme:

> "*…the programme was very effective, as it should how do they do on operations… they did this very well… the after action review demonstrates this*." [MPM-006]

4.6.7 Systemic Leadership Development observations

The analysis in this section revealed some fundamental factors within organisational leadership for generating systemic leadership development.

The first factor of influence - the paradoxical *inflexibility* - may actually have a serendipitous effect on systemic leadership development by stimulating collective synergies and social structures, through fostered unity and a rigidly applied consistency of behaviours and expectations. These are long term in nature and contextually situated.

The second factor identified, *sovereign selection*, also has the potential to generate systemic leadership, as the entire process is aligned with the needs of organisational development and social structures and processes - which are encapsulated in the criteria and standards expected of participants. There are clearly drawn lines of expectations, which potentials must meet; this generates consistency (which in turn effects collective synergies and social structures) and an explicit meritocracy. This potentially supports the fostering of trust, cooperation, reciprocity and social awareness.

The presence of *transformational leadership* has the catalytic potential for stimulating systemic leadership development, as it fundamentally looks to generate collective and relational social awareness within organisational environments (Bass, 1985). It provides a strong catalyst for generating social awareness across all aspects of the systemic definition, and caters for the individual engagement needs of forging commitments and building trust, goodwill and reciprocity. The observation that transformational leadership is evidently practiced by the programme staff also supports systemic leadership development, as it reinforces organisational development alignments and demonstrates extant social structures and processes.

The situating of leadership within a *social-collective* paradigm also reveals a potential systemic catalyst, as it promotes a SAEI perspective of leadership, which is inclined towards social awareness and long term organisational impact. This draws the emphasis away from egoistic impact towards collective impact. This also has the potential to positivity affect collective synergies and the construction of social structures and processes.

The attendance of *values-behavioural synonymy* suggests systemic leadership development may be developed through fostering trust, cooperation, reciprocity within collective synergies and social structures and processes. It also reinforces social and organisational imperatives through transformational leadership.

Finally, the postulation that organisational leadership, and leadership development, is *explicitly progressive* invokes a whole-system approach to leadership, where it is holistically linked to organisational development, through direction and alignments as well as explicated social and organisational imperatives; and is not merely an isolated, personal development activity: rather one that is intrinsically situated within the organisational context; and is long-term focused and socially-orientated.

4.7 Case Study B – Fi Thematic Analysis: Catalysts and Inhibitors

The within-case analysis will now specifically critically discuss the cardinal themes from the literature review (Chapter Two), which in turn generated the thematic elements of the Fi Model (Chapter Three), and were reflected in Research Question One:

> **RQ1**. *Systemic leadership development is influenced by which factors, across the cardinal themes of inquiry?*

4.7.1 Element One: Delivery

In this section, like Case Study A, the researcher sought to delve deep into interviewees' responses, by asking them to extrapolate value judgements alongside reflections on how the programme was delivered (see **Appendix E**).

The analysis of *Element One: Delivery* exposed some important potential catalysts. These are demonstrated below in **Figure 4.11** and subsequently discussed. It should be noted that only positivity was expressed regarding programme delivery and that there were no apparent potential inhibitors in the analysis.

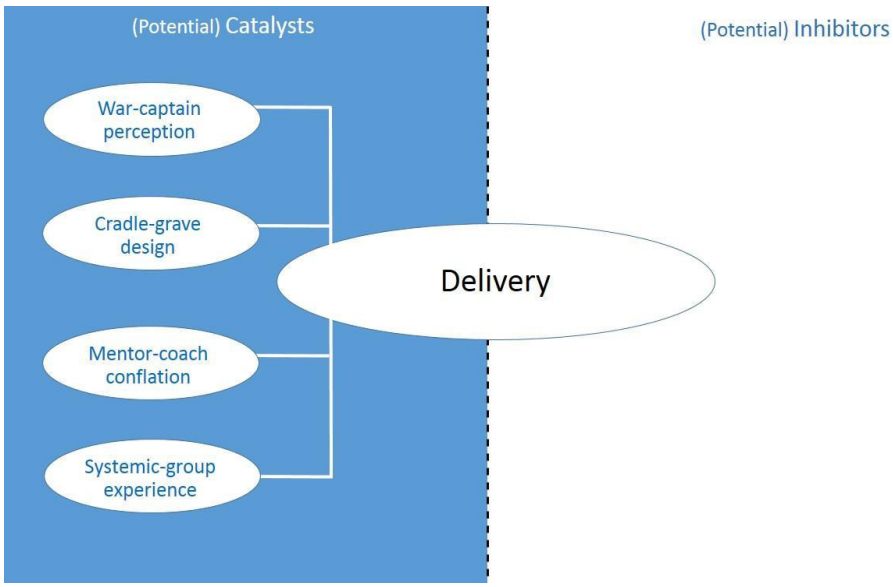

Figure 4.11 - Element One: Delivery Fi Analysis. Source: Author

Catalysts – Delivery

4.7.1.1 War-captain perception

The analysis revealed a clear catalytic relationship between leadership trainers and participants, with regards to the trainers' authority and credibility to facilitate the development of organisational leadership. This authority and credibility was inseparably grounded in the fact that all instructors were

internal leaders of the British Army, with considerable and enviable operational and evidential leadership expertise. Furthermore, all participants were divided into roughly thirty-person syndicate groupings for the year-long duration of the programme, where each syndicate was supported by two leadership trainers: one a mid-level leader (Captain-rank), slightly higher up the seniority and hierarchy, and another slightly junior (Colour/Staff-Sergeant) to the participants. The complementarity of these two trainer perspectives supports the authority and credibility and w*ar-captain perception*.

The war-captain concept is one where leaders demonstrate their efficacy in the operational 'battlefield' (Showalter, 1988). Where they have demonstrated and reinforced their efficacy by 'thriving in a crisis' environment; thus achieving leadership validity (Doyle and Smith (2001). This validity was significantly evident in the analysis. The leadership trainers were viewed as hugely effective by virtue of their impressive and relevant "*huge operational experience*" [MLT-019]. The instructors have a "*real understanding of the top of the speer*" [MPO-021] through "*operational experience*" [MLT-022] and subsequently have "*huge operational experience and skill sets*" [MPO-020]. This experience, meaning "*they have seen a lot of quality… and can contextualise everything…*" [MPP04-006], provides a credible link for the participants between the programme experiences and the real-world leadership application. It is because the leadership trainers "*must have operational experience to command respect… not theorists…*" [MPM-016], or in another participants words, they are "*…field officers more than desk officer…*" [MLT-021], and this "*hones and directs them*" [MMP01-006] with regards to achieving leadership development. The participants were all explicitly clear about the positive influence of this operational experience, breeding authority and credibility.

The unassailable credibility of the trainers was clear from participants' responses:

> "*…their front line experience…regarded as 'high achievers'…quality assurance*" [MPM-010]
>
> "*…they are clearly suitable; they passed their only tough selection to be here…*" [MPP06-008]
>
> "*…they are here on merit…they have been there, done it…*" [MPP06-009]
>
> "*…trusted them implicitly… you couldn't possibly know better…*" [MPP08-008]
>
> "*…been there before… the officer has actually been through this very course before…*" [MPP08-009]
>
> "*…all about experience and credibility…who could argue with that?"* [MPP08-007]
>
> "*…they seemed to be the top of the pile… the cream…*" [MPP08-014]
>
> "*…easy to see why they are here…*" [MPP08-017]

There was also a recognition that the developmental approach of the leadership trainers was effective. Their vast authority and credibility was seen to make them "*decisive*" [MPP03-001] when it came to the expectations of organisational leadership. It was also recognised that:

> "…*they are inspirational and very effective at developing leadership in us*…" [MPP04-007]
>
> "…*they are a very high standard*…" [MPP08-006]
>
> "…*my personal experience is that of excellence*…" [MMP01-005]

These observations of excellence relate to the trainers ability to demonstrate effective leadership and utilise a mentoring and coaching approach. Finally, the addition that the "*instructors must understand culture: professional, moral and high pressure*" [MPM-015], supports the integration of context and values into the developmental experience. The observations regarding efficacy of approach are discussed further in the *Mentor-coach conflation* factor of influence, below.

Finally, and perhaps most importantly, the experiences and expertise of the leadership trainers relates entirely to the successive future leadership appointment of the participants. It is hard to imagine a more directly relevant perspective.

4.7.1.2 Cradle-grave design

The analysis revealed a strategic perspective within the programme design; where organisational and leadership development needs, in a future-context sense, have been conscientiously considered. This includes considerations of the start-state, requirements of mid-level leadership, and future-state integration with operational environments and subsequent developmental programmes and interventions. This shows signs of 'cradle-to-grave' thinking in systemic leadership development.

This factor is manifest in various observations regarding the leadership instructors, such as their selection for having "*huge operational experience*" [MLT-019] and "*prior courses experience*" [MLT-029]; which provides a wider organisational relevance and contextualisation within the programme. These factors provide real-time strategic connectivity to the social and organisational imperatives and to the direction of the organisation; as well as its social and cultural awareness considerations. This connectivity is demonstrated across various participants' observations:

> "…*the majority of staff are well prepared and fully understand the task in hand."* [MPP02-006]
>
> "*They could give fantastic career advice and guidance*." [MMP03-004]
>
> "…*they give advice about the future issues for leadership*…" [MMP03-005]

Also, the policy that instructors should only serve a "*two year rotation gives freshness and current operational experience*" [MPM-017]. This keeps the strategic connectivity fresh and contextually relevant.

Interconnectivity with strategic context and subsequent environmental challenges and needs are also found within the programme design and delivery with the development of the "*combat estimate and orders experience... this is a key part of leadership*" [MLT-025]. The combat estimate and orders process is a key strategy planning and decision-making tool used across the entire British Army; consistently taught at junior level leadership, right up to the most senior levels of leadership. It is a significant golden thread for the organisation. Mid-level leaders on the programme receive considerable development regarding its effective use. As part of the programme, leaders are also challenged in the use of the estimate and orders at more strategic levels - senior leadership – by developing "…*planning and decision making at brigade level*…" [MLT-026]. This allows participants to better understand the big picture, beyond the programme, and even at later stages in their careers [MPP08-012]. However, the linkages are explicit and thoroughly understood by the participants; making the development future-state relevant.

The connectivity to the wider systemic context is axiologically and cognitively reinforced through the behaviours of the programme owner; where the "*commandant sets standard and example of leadership*" [MPO-015]; and the theoretical and cognitive role of the "*academic staff to support intellectual development*" [MPM-018].

More evidence of the cradle-grave design can be observed in the design and delivery approach of using pairs of leadership trainers for developing leadership. The junior of the two trainers is intended to facilitate a contextual perspective to the leadership development experience; what is expected of the mid-level leader, from the perspective of the direct report, who is a slightly junior leader. However, the junior leader will have "worked with commissioned officers before" [MPP08-010] and is expected to have considerably greater operational and professional experience within the organisation; and as such provides the professional archetype:

> "…*the Colour-Sergeants have seen the end product very often… therefore they provide upward perspective*…" [MLT-028]

The professionalism of the Colour-Sergeant is complimented by the leadership-exemplar role of the second leadership trainer, who is an officer, Captain-rank; and a slightly more senior leader than the participants. The complementarity of the instructors, and their respective roles, was recognised in participants' responses:

"…there was complementarity with instructors…" [MPP07-010]

"…you got more leadership from the officer, more professionalism from Colour-Sergeant…" [MPP05-009]

"….*officer gave example & education; Colour-Sergeant gave training & skills*…" [MPO-016]

The officers are selected based on an exemplary record for effective leadership and having demonstrated unfalteringly the organisational values and standards.

"…*the officers must provide intellectual, to guide and steer... through moral scenarios… and develop judgement*…" [MPO-023]

The programme owner draw particular attention to the moral component:

"…moral – they must have it right. I've removed 2 officers for moral failures. Must be perfect." [MPO-025]

The two instructors' perspectives represent systemic leadership development needs: integrating environmental context, follower expectations (within a social relational context), social and organisational imperatives and the multifarious view of leadership.

4.7.1.3 Mentor-coach conflation

The analysis identified another potential catalyst in the developmental role of the leadership trainers: a conflation of mentoring and coaching roles into a single role. This may be described as a *mentor role; coaching method* approach. This conflation is evidenced in the attributions of the participants regarding the delivery suitability and approach of the leadership trainers. The observations of the participants were entirely positive concerning the suitability and developmental approach employed by the trainers; indeed, the unanimity of praise and recognition was a surprising revelation in the analysis. The reasons for the laudation and efficacy appear to be linked to a universal appreciation for their authority and credibility:

"…*all about having credibility as a leader*…" [MPP07-004]

"…*the instructing staff oose credibility*…" [MLT-017]

"…*with the DS* (Directing Staff) *all about experience and credibility… and who could argue with that?"* [MPP08-007]

This credibility is validated through robust selection processes. Initially, all potential leadership trainers must be "…*selected by cap badge*[5] *to represent*" [MLT-018]; where they must be ranked within the top-third amongst their peers. The Colour-Sergeants then must conduct a pre-programme "*cadre, where only best selected*" [MPO-018] and the Officers, who *must* have successfully conducted the programme earlier in their careers, must pass a "*board selection*" [MPO-019]. Once the best of the candidates have been selected, the final consideration is a systemic one: the collection of leadership trainers must "*represent different operational contexts*" [MPO-019]. This ensures that multifarious contextual perspectives are represented. The efficacy of this selection process, for generating the most credible trainers, was recognised by participants: "…*they are clearly suitable; they passed their only tough selection to be here*…" [MPP06-008] and they have "…*been there before… officer has been through this actual course*…" [MPP08-009]

This credibility and authority of the trainers was also manifest in their professional credentials:

> "…*huge operational experience*…" [MLT-019]
>
> "…*their strategic / high level awareness and understanding*" [MLT-023]
>
> "…*they have extensive estimate and orders experience... key part of leadership*" [MLT-025]
>
> "…*planning and decision making at brigade* (strategy) *level*…" [MLT-026]

These credentials, coupled with the validated and recognised high-quality of the leadership trainers, provides for excellent leadership mentors. Indeed, the "*mentoring emphasis*" [MPM-013] in the delivery of leadership development by the leadership trainers is significant in the data analysis, in multiple ways:

Through "*reliable*" [MPP03-006] specific career guidance:

> "*They could give fantastic career advice and guidance*." [MMP03-004]
>
> "…*advice about the future issues for leadership*…" [MMP03-005]
>
> "…*the instructors could refine impressions and assumptions with experience*…" [MPP07-014]

The conveyance of authoritative contextual knowledge and experience:

> "…*experience… seen a lot of quality… can contextualise everything*…" [MPP04-006]

[5] Referring to particular operational discipline of the Army: Artillery, Logistics, Infantry etc.

"…*if you emulated them, you would do well… but you trusted they were right*…" [MPP08-011]

"…*trusted them implicitly… you couldn't possibly know better*…" [MPP08-008]

"…*they had authority… more senior and experienced… still relying on instructor judgment*." [MPM-028]

"*They were able to express views clearly… instructor authority important for judgement*." [MPM-029]

"…*they seemed to understand more the big picture… an awareness much greater*…" [MPP08-012]

"…*any questions you had, they had the answers*…" [MPP08-013]

"…*you could be sure they teach essential practicalities*…" [MPO-022]

Manifesting an archetype of practicing leadership values and standards:

"…*they showed me that it was all about looking after people… welfare of the subordinates.*" [MPP05-007]

However, the analysis also showed not only evidence for mentoring, but also of trainers utilising effective coaching. Much of this may be resultant of significant preparation, through training and development, prior to commencing the programme. All of the leadership trainers receive considerable training in how to deliver:

"…*effective lessons, delivery methods, coaching techniques… all conducted during a two week course prior to starting their training appointment*…" [MPM-012]

Attendance is mandatory on this two-week instructors' course, where all trainers are developed as coaches as well as instructors. The course - *Defence Train the Trainer (DTTT*) - is conducted at the Army Staff Leadership School (ASLS) in Pirbright, England. On this course the instructors acquire various sophisticated coaching techniques, like the GROW model, ABC model and Self-Image Model. These are all intended to improve the trainers' ability to engage in meaningful learning engagements with programme participants.

Furthermore, within the Academy, all instructors receive ongoing coaching support by a "*coaching advisory team… master coaches, over-watching instructors*" [MPM-014]. The Master Coaches have received extensive coaching development at ASLS, beyond the DTTT course. They also ensure high

standards are maintained on the exercises and workshops and that coaching methods are being applied.

This commitment to develop effective coaching methods within the programme was reflected in the participants' observations of the instructors approach to training delivery:

> "…*they are inspirational and very effective at developing leadership in us*…" [MPP04-007]
>
> "*They were very approachable*." [MPP07-008]
>
> "…*They are inspirational and very effective*…" [MM01-007]
>
> "…*personality is key: can relate, be personable, develop inter-personal relations*…" [MLT-020]
>
> "…*the bits of less shouting works better*…" [MPP06-006]
>
> "…*they showed an autocratic approach is unnecessary and doesn't work.*" [MPP05-008]
>
> "...*lots of new learning… definitely developed as a leaders*…" [MPP07-006]
>
> "…*the instructors had very well applied training techniques and progressive development for the cadet*…" [MPP02-003]

Key to utilising the effective coaching approach was for leadership trainers to demonstrate the correct developmental techniques and behaviours, and a genuine commitment to support participants through the learning experience:

> "…*simplicity is key: translating the learning to lower voices!*" [MLT-027]
>
> "…*utterly linking the leadership elements to those roles*…" [MPO-017]
>
> "…*instructors are capable of dealing with Cambridge double-Firsts - punch at same level*" [MPO-024]
>
> "…*they are extremely dedicated…they literally live and breathe this*…" [MPM-008]
>
> "…*the role of example is fundamental*…" [MPM-011]
>
> "…*not everyone progresses at the same pace, but there is a standard all must hit*" [MPP02-005]

Participants identified that it was a marriage of credibility and authority of experience (mentoring) and the application of sophisticated coaching techniques that "…*hones and directs them*…" [MMP01-006] through delivery of the programme; indeed the synergy of these two roles appears to have generated a positive catalytic effect in leadership development.

4.7.1.4 Systemic-group experience

The analysis revealed a potential systemic catalyst in the design of the programme: the situation of leadership development within a systemic-group experience. Fundamentally, this was marked in the significant volume and application of stretch assignments, action-learning sets and scenario-based learning; where participants were daily challenged in their leadership efficacy in a social setting.

This potential catalyst was also extant in the purposive representation of the wider organisation amongst the leadership trainers, "*…there is mixed cap-badge in Directing Staff: from corps and infantry…*" [MLT-024], this is to fully represent the contextual differentiation and systemic perspectives. There were also linkages to particular wider organisational leadership issues and development: e.g. "*estimate and orders experience*" [MLT-025] and "*planning and decision making at brigade level*" [MLT-026]. These issues represent greater systemic social and organisational awareness issues. The systemic element was also supported by the "*…prior courses experience…*" [MLT-029] of the leadership trainers; this endorses real-world linkages, organisational development and the construction of social structures and processes.

The application of group-based leadership development, where leadership behaviours are socially-constructed and forged out of a collective, relational experience, may also have a potential catalytic effect on systemic leadership development. This effect was evident in many of the participants' observations:

> "*…it's all about peer mentoring…getting there together… learning and developing with others…*" [MPP06-004]
>
> "*…about watching others do well, equally some to fail…*" [MPP06-005]
>
> "*…key message; you are leading a team not just yourself!*" [MPP04-010]
>
> "*…the standards were high that you had to up your game…*" [MPP08-015]
>
> "*…they (instructors) certainly looked after us… a sense of well-being… they were good for us…*" [MPP06-007]

This systemic-group experience also has the potential to catalytically generate collective synergies as the group forms into an effective team and trust, goodwill, cooperation and reciprocity emerge.

4.7.1.5 Systemic leadership development observations

The analysis of *Element One: Delivery* demonstrated several important factors of influence for generating systemic leadership development.

Firstly, particular attention should be afforded the collective relational orientation of programme delivery; this was a predominant observation. At all times, effective organisational leadership was a phenomena developed within social contexts. This social interaction was the anvil on which leadership was forged. Supporting this was a commitment to orientate the programme towards wider organisational needs and context. The integration of context and organisational imperatives was manifest across all of the potential catalysts identified.

The *war-captain* catalyst fundamentally provides explicit real-world leadership linkages to context and future appointments for the programme participants. The trainers provide archetypes of organisational leadership towards which the participants must emulate. This promulgates a social awareness across all factors of systemic leadership development, and aligns participants' forging and maintaining of commitments with social and organisational imperatives; through explicated, unequivocal guidance and idealised influence. Furthermore, collective synergies were generated by interaction between the participants and the leadership trainers, through trust, cooperation, goodwill, and reciprocity and feedback and challenge.

The *cradle-grave design* catalyst shows signs of systemic thinking in the programme delivery; from potentially generating organisational development through real-time strategic connectivity to the social and organisational imperatives and direction of the organisation; to also potentially contributing towards developing social and cultural awareness, with regards to integrating social and network systems, beyond merely the programme bounds. This is manifest in the necessity of prior relevant leadership expertise and operational experience with the leadership trainers - and that different operational contexts of the organisation are represented - and also in the future-state requirements of leadership at more senior levels of the organisation, and subsequent training and development interventions. This systemic view considers the start-state necessities and the future-state necessities and incorporates those into the programme design. The systemic perspective is also represented in the complementarity of the instructors; two leadership perspectives representing systemic leadership development needs: integrating context, expectations, social and organisational imperatives and the socially-constructed multifarious view of leadership. This approach incorporates what effective leadership should look like to both followers and superiors; yet avoid duplicity and ambiguity regarding desirable behaviours.

The *mentor-coach conflation* catalyst potentially reveals a strong positive influence for generating collective synergies through forging and maintaining commitments - via credibility and authority - and fostering trust, cooperation, goodwill and reciprocity between participants and trainers – via the acknowledgement of superior knowledge and contextual appreciation - and the potent efficacy of

challenging performance feedback. There was an undisputed acceptance, indeed collective social awareness, among the participants that the guidance given during the programme represented a systemic standard and expectation, towards which the participants must aspire and ultimately achieve. This would be achieved by observing the conveyance of authoritative contextual knowledge and experience, and through the manifestation of an archetype of practicing leadership values and standards. In practical terms, this appeared as relevant and influential career guidance. This valuable, systemic, role of the mentor was supported by some highly developed coaching methods, which assisted the delivery of the developmental interventions and engendered a reflexive, developmental learning experience within the participants. The mentor-coach role of the trainers was supported extraneously by a hierarchy of coaching network support and was integrated into wider social and network systems, such as Army Staff Leadership School, in Pirbright.

The final potential catalyst: developing leadership within a *systemic-group experience,* exposed some significant possible linkages with influencing systemic leadership development. Leadership development in this programme is entirely situated within social contexts; meaning a collective and relational orientation of leadership is crucial, indeed, practicably unavoidable. The systemic-group experience has the potential to catalytically generate collective synergies as groups form, through intimate proximity and shared hardships, into an effective team, where trust, goodwill, cooperation and reciprocity naturally emerge. The reasons for this approach are inextricable linked to the aim of systemic leadership development: collective synergies, organisational development and social structures and processes. By immersing participants into a group environment for an entire year, and utilising the war-captain and mentor-coach roles of the leadership trainers, collective synergies emerge. In employing group-based leadership development, where leadership behaviours are socially-constructed and forged out of a collective, relational experience, this would naturally produce a catalytic effect on systemic leadership development. Also, by utilising prior relevant experiences and expertise of the leadership trainers, this endorses real-world linkages, organisational development and the construction of social structures and processes.

4.7.2 Element Two: Contextualisation

The analysis of the Fi Model *Element Two: Contextualisation* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.12** and subsequently discussed.

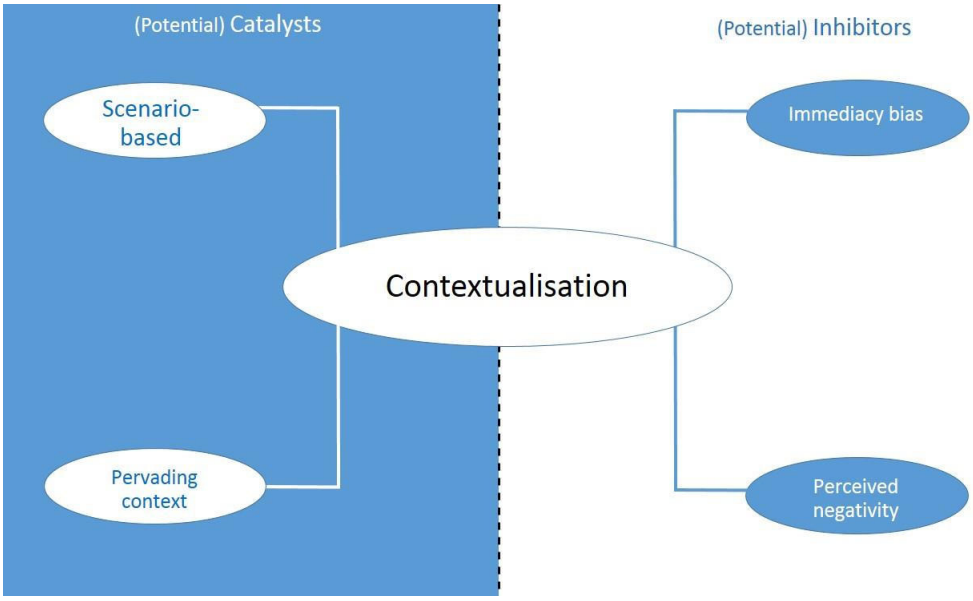

Figure 4.12 - Element Two: Contextualisation Fi Analysis. Source: Author

Inhibitors – Contextualisation

4.7.2.1 Immediacy bias

The *immediacy bias* factor concerns the imperative of the programme to develop leadership skills and behaviours appropriate to the immediate leadership appointments after programme participation. This immediacy bias may potentially hinder longer-term leadership development aspirations; for example, with identifying high performance individuals for fast track through the ranks or identifying and nurturing future Generals. The current approach does not account for this sort of long-term consideration. The current focus – where "*everything is linked to next leadership role*" [MPP05-012] - is discussed later in *Element Five: Impact*. However, it would appear this potential inhibitor might paradoxically also be a catalyst, depending on the perspective of expectations: either from an individual or organisational perspective. From the latter view, having the developmental experience contextualised to the immediate future of the participant, has a tangible organisational benefit, in that it mitigates skill-fade and forgotten learnings; it is consistent with immediate short-term succession and talent management; as well as systemic leadership development needs. One of the tenacities of systemic leadership development is to generate long term orientated leadership perspectives, and focusing predominantly on fulfilling the next appointment might paradoxically inhibit this kind of long term development. However, from an individual leader perspective engaging in "*technical skills*

development in relation to the next future operational context" [MP007-012] might seem myopic and short-sighted for some participants. Indeed, several participants observed that greater "*strategic content would be desirable*" [MPP05-020; MPP01-008].

4.7.2.2 Perceived negativity

The analysis also revealed participants may acquire negative perceptions of the programme based on their personal experiences. Though these were not considerable enough to deter their participation, they were significant enough to distract the individuals from fully engaging in the learning experience, and indeed, those particular individuals faired less successfully in the ranking and performance grading. Specifically, negative experiences identified were "*pressure*" [MPP06-010] and "*black humour*" [MPP06-010]; however, some were more psychological, like the fear of making mistakes on the programme because "*mistakes cost*" [MPP06-011]; subsequently, the experience "*becomes self-preservation for some*" [MPP06-011]. This negativity may result from an unwillingness to be reflexive and transform individual notions of leadership into the necessary, systemic notions of organisational leadership, outlined earlier in the chapter. This conflict may arise from competing expectations. Examples of competing expectations were found in participants' responses:

> "…*we should do more academics, not the charge on machine gun style*…" [MPP01-008]

> "…*potentially not female-focused… just infantry*…" [MPP03-009]

However, as one participant reflected, it is "*hard finding common ground for everyone… depends on expectations*…" [MPP08-021], and in this leadership development programme the expectations and needs of the organisation are paramount, an indeed, overwhelming.

Catalysts – Contextualisation

4.7.2.3 Scenario-based

The analysis revealed a significant commitment within the programme to incorporate contextualisation by employing scenario-based interventions. The use of scenario-based leadership development pervaded observations of every participant interviewed. These scenarios evidently contained strategic linkages:

> "…*definitely contextualised… Afghanistan related on exercises*…" [MPP07-011]

> "…*much is Afghanistan focused as that is the current issue*…" [MPP02-007]

> "…*also future context; not just the war in Afghanistan.*" [MLT-034]

Indeed, balancing future strategy options, whilst maintaining a concerted focus on current (Afghanistan) needs, was clear in the data analysis. This ability to traverse across current and future strategic needs was purposive, as reflected in the responses of the programme owner and programme manager, who whilst explaining the rationale being scenario-based exercises, identified:

> "…(the scenarios) *use common things that will not change, yet hold onto that which is the same*." [MPO-027]

> "…*20% is common, 80% isn't.*" [MPO-028]

> "…*but maintain linkages through what is enduring and what is transcient*." [MPM-020]

A requirement to be reactive and evolutionary in the design of scenarios was incorporated into the programme design, where the applicability and relevance was frequently assessed by the programme management team, and adjustments were made to the scenario simulations [MLT-037].

The analysis also revealed that the scenario-based interventions were "*definitely operationally focused*" [MPP05-011], where they delved into the details of operational realities: with all its complexities and tensions. This "*asymmetry in the exercises*" [MPP08-022], where the "*exercises resemble operations with the pressures and stresses*" [MPM-021] generated "*confusion and complexity*" [MPP08-023]. The programme leadership trainer felt this "*complexity is key, as it develops effective intelligence*" [MLT-036]. This notion of effective intelligence was supported by the programme manager who observed that the complexity and pressures of the scenario-based exercises "*generated fatigue… and difficult situations, putting pressure on the cadets, who then had to assess it*" [MPM-022]. One participant summed this up succinctly:

> "…*the FOB* (Forward Operating Base) *work was effective… we were in a tight environment, small team, delegated decisions, pressure, example*…" [MPP04-009]

The analysis revealed that scenario-based interventions generated heightened awareness within the participants as to real-world needs and leadership tensions within the organisational context; and also developed appropriate, effective intelligence for demonstrating leadership within complexity and confusion.

A key linkage here is with the desirable leadership behaviours, outlined in the organisational leadership discussion earlier, where contextualisation must conflate with behaviours, in order that the correct sort of good leadership is being development through the exercises. The programme manager described this as "*assessing behaviours in their true manner*" [MPM-023]. This involved the participants being *"assessed against the ten dimensions (leadership elements)*" [MPM-024], where the "*the*

leadership roles in exercises are important for feedback" [MPP03-007], to ensure the 'dimensions' are evidently being developed. This linkage between contextualisation and desirable behaviours and skills was reflected in various narratives of participants:

> "…*self-discipline… setting an example… serving to lead… all tested in exercises*…" [MPP06-013]

> "…*the exercises ensured technical skills development in relation to the next future operational context*…" [MP007-012]

The analysis also showed that the programme participants experienced a high volume of scenario-based exercises, over the duration of the 46 weeks, which in turn had a positive influence on their individual leadership development. The high volume of exercises generated a systemic engagement with the participants - facilitated through collective experiential learning - with all expressing considerable personal development. This development was clearly evident across participants' narratives:

> "…*we were always out doing exercises, all relating to real life scenarios*…" [MPP08-018]

> "…*you couldn't hide from development; they had so many exercises*…" [MPP08-019]

> "…*the more you developed through exercises and appointments, the more you got.*" [MPP08-020]

> "…*you learned more* (on exercise)…" [MPP03-008]

> "…*key message; you are leading a team not just yourself!*" [MPP04-010]

> "…*it develops and progresses with complexity and the sheer amount of exercises… that is very effective*…" [MPP05-010]

Consequently, the effect of scenario-based exercises was clearly positive in generating a contextual preparedness for future leadership appointments, where participants believed that the exercises:

> "…*makes you think 'I can actually do this!'*…" [MPP05-013]

> "…*much better prepared for barracks life than I originally thought*…" [MPP01-009]

> "…*I believe very useful in preparation for your future role…*" [MPP02-009]

> "…*were clearly linked to next leadership role*…" [MPP05-012]

Furthermore, it was evident in the data analysis that retention of learning experiences acquired during scenario-based exercises was notably high, with significant alignments and consistencies across participants' learnings (as discussed above). The analysis revealed that the factors within the potential catalyst: the contextually relevance; linkages to future role; high volume of exercises; development of desirable leadership behaviours and skills; all reinforced by feedback and repetition in a social context, all potentially contribute towards this learning efficacy and retention. Also, with regards to systemic leadership development, the shared experience is notably socially constructed, supporting a collective shift in behaviours; guiding them towards organisational needs, not just the inclination of individuals.

4.7.2.4 Pervading context

A significant emergent theme from the data analysis was the extensiveness to which contextualisation was integrated into the programme. This contextualisation was briefly discussed in the previous catalyst, however, the degree to which it pervaded the programme merits a more specific discussion.

The programme owner concertedly drew attention to operational-strategic context integration, where he stressed programme content must be "*right up to modern context*" [MPO-026], with participants being specifically prepared for real-world needs, creating linkages between day-to-day leadership behaviours and challenges and higher strategic needs. Some of the day-to-day behaviours and challenges will be consistent across contextual differentiation, and for developing leaders these are "*common things that will not change*" [MPO-027], therefore the programme aims to "*hold onto that which is the same*" [MPO-027].

In this sense, the programme "*can be very general in training too*" [MPP02-008], as "*although we will all work in different units, there are commonalities*" [MPP06-012], and the programme "*works, as the concept is roughly the same: the skills are common*" [MPP04-008]. This commonality within context was acknowledged by the leadership trainer and, importantly, further-expanded to include an expectation of organisational standards:

> "*Whatever arm, certain things must be consistent… however, cadets must reach commander standard*" [MLT-032]

This standard is thoroughly integrated into every aspect of the programme: design, exercise scenarios, assessment, feedback, remediation and discipline. It is prescribed, consistent and, vitally, systemic. In short, the standard is the attendance and confirmation of the behaviours (ten dimensions [MPM-024]) and technical operational skills (e.g. effective intelligence [MP007-012; MLT-036) required to be an effective leader in the next appointment. This point was reflected widely in the data:

"...*I believe very useful in preparation for your role…*" [MPP02-009]

"…*much better prepared for barracks life than I originally thought*…" [MPP01-009]

"…*technical skills development in relation to the next future operational context*…" [MP007-012]

"…*you could literally see where your leadership would be applied subsequently*…" [MPP07-013]

However, this consistency does not invoke inflexibility in the programme, indeed, contextual needs may require adjustments to the application of leadership skills and behaviours, dependent on the changing longer-term or strategic needs. For example, "*future context; not just the war in Afghanistan*" [MLT-034]. There is a recognition that:

"…*something else absolutely will come up. Thus generic identification is still valid, but regular feedback across the Academy and the wider army is important for any subsequent alignment*" [MLT-037].

This "*advice about the future issues for leadership*" [MMP03-005] is "*a lot about widening horizons and stepping-up a notch in strategy awareness*" [MPP07-007].

Thus, the view is held that some things are consistent across leadership roles, and other things require differentiated consideration and integration, or that "*specificity is left to subsequent courses and organisations*" [MPM-019], however, either is in order to 'step-up a notch' in long term, strategic integration. However "*linkages through what is enduring and transcient*" [MPM-020] must be made during this leadership development programme in order to generate this necessary broader awareness.

The importance of contextualisation was explicitly clear in the data analysis, with the programme hinged entirely upon simulating and integrating situational factors for leadership development. The programme owner stated this equally unequivocally as:

"*Understanding context is critical; we* (the programme) *fail without it*." [MPO-030]

4.7.2.5 Systemic leadership development observations

The analysis of *Element Two: Contextualisation* uncovered several potential factors of influence in generating systemic leadership development.

Firstly, the *immediacy bias* factor may potentially inhibit systemic leadership development due to a lack of long-term orientation; rather focusing predominantly on fulfilling the needs of the next appointment. However, paradoxically, there may be an immediate benefit at the systemic, organisational level in maintaining this perspective. Essentially, having the developmental experience contextualised to the immediate future of the participant potentially generates tangible organisational benefits: mitigates skill-fade and forgotten learnings, generates efficacious contextualisation, and is consistent with immediate short-term succession and talent management. These have potential systemic benefits in achieving organisational development imperatives, team building (across a peerage of shared - relational - experiences) and immediate integration with relevant social and network systems.

The *perceived negativity* factor highlighted a familiar tension in leadership development: the vying between the needs and expectations of the individual (local) and those of the organisation (systemic). The perceived negativity in several of the participant's narratives reflected this egoistic conflict; resulting in an apparent resistance towards accepting systemic demands of the programme, and indeed of the wider organisation. In this programme, the needs of the organisation are explicitly paramount, and indeed, those that are resistance to these needs appeared to perform less well during the programme.

The *scenario-based* factor revealed that the simulated exercises provided a potential catalyst in generating systemic leadership development, with regards to heightened awareness of organisational needs and how leadership must perform within this context. Importantly, these learning experiences are conducted collectively, where the shared experience is notably socially constructed; which supports a collective shift in behaviours; guiding them towards organisational needs, not just the inclination of individuals. This approach supports the development of collective synergies and social structures and processes. Also, the high volume of exercises presents a systemic engagement - facilitating large amounts of collective experiential learning - with the participants continuously reinforcing systemic factors, all guided and refined by trust, cooperation, reciprocity, feedback and challenge. This point is supported by the observation that significant retention of learnings occurred across the participants – with their narratives bearing remarkable resemblances.

The *pervading context* factor revealed an operational and strategic context integration, where linkages between day-to-day leadership behaviours and challenges and higher strategic needs were incorporated into the programme. This potentially supports systemic organisational development, where setting direction and alignments are purposively integrated into the contextualisation elements of the programme experience. This also potentially facilitates long term organisational impact.

4.7.3 Element Three: Performance

The analysis of the Fi Model *Element Three: Performance* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.13** and subsequently discussed.

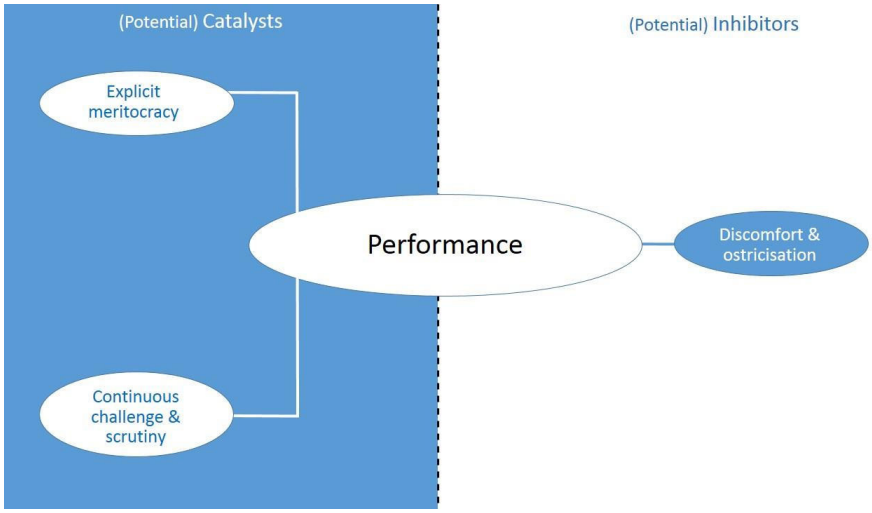

Figure 4.13 - Element Three: Performance Fi Analysis. Source: Author

Inhibitors – Performance

4.7.3.1 Discomfort and ostracisation

The analysis revealed a potential inhibitor in the discomfort of certain participants, those with particular negative experiences, which appears to consequently lead to a degree of ostracisation amongst their peers and the programme.

Individuals' discomfort with the programme emerged out of several factors: fear of making mistakes [MPP06-011], under-performance [MPM-036], inappropriate or incorrect behaviours [MPM-041] and inability to change [MPP08-032]. One participant recognised that "*mistakes cost, therefore the programme experience becomes self-preservation for some*" [MPP06-011]; in this situation the individual is not getting the fullest from their experience, but rather focusing on not "*raising their head above the parapet*" [MPP06-011] where it might be lobbed-off. This reaction is perhaps correlated to the observation of the programme manager that participants "*are left in no-doubt; both why and what about their personal performances*" [MPM-036], and also that the programme is focused on "*challenging bad behaviours and inappropriate conduct*" [MPM-041]. This challenge-orientated approach appears to leave some participants feeling uncomfortable with their performance.

In fact, the analysis revealed that participants who felt discomfort appear to have a diminished experience of the programme, due to some form of ostracisation. One of the participants who expressed such discomfort reflected:

"*I would have liked more feedback. I feel like I did not get enough. Having more is linked to having more appointments. I just didn't get many.*" [MPP03-010]

Again, this experience may be correlated against observations of the programme manager, where he expressed that with regards to performance feedback, the cadets receive "*just about enough. Certainly the cadets would like more… actually, the top cadets get more*" [MPM-035].

This reveals a possible correlation between the discomfort and ostracisation: the ability for participants to change their performance subsequent to receiving feedback. Those who adapt and improve receive greater attention and development; where as "*those that don't change, get binned. They don't last, as they get more scrutiny*" [MPP08-032].

Catalysts – Performance

4.7.3.2 Explicit meritocracy

The analysis revealed a potential catalyst in an explicit meritocracy with regards to participant performance. Indeed, performance hierarchies and rewards were integrated throughout the programme: across progressive levels of seniority, grades, review and assessment etc.

Equally, it was recognised that "*not everyone progresses at the same pace*" [MPP02-005], yet, there was a robust position that "*there is a standard all must hit*" [MPP02-005]; and indeed, "*the standards were high and that you had to up your game*" [MPP08-015] throughout the programme. This would naturally lead to obvious differences across participants' performance; meaning the learning experience was:

"…*about watching others do well, equally some to fail…*" [MPP06-005].

This performance culture evidently generated pressure on the participants to perform well, primarily due to "*knowing that feedback was coming, therefore there was a pressure to act*" [MPP07-015].

Key to generating a meritocracy - where performance can fairly and accurately be differentiated across all participants - was having a systematic approach to performance measurement. The programme owner drew particular attention to the "brilliant system" [MPO-039] in place. The system commences at the pre-programme selection stages, where potential applicants must "*demonstrate the correct profile, as well as clearly express a serious interest*" [MLT-015], this involves submitting a formal application proforma and conducting an individual interview with a senior leader in the army. Only upon successful completion of these stages, the potential applicant can then attend a "*rigorous three days selection process, where they are assessed and reported on… all linked to ten leadership*

dimensions on the main programme" [MLT-016]. The standards are set very high so that potential participants of the programme have all "*passed the bar at selection stages*" [MPO-041]. Indeed, the high standards result in "*8% that do not make it through the selection process*" [MPO-041].

Once on the programme, participants will have their performance assessed in several ways: self-assessment, peer-assessment and directing-staff assessment. These different perspectives allow "*objectivity in the system*" [MLT-056] and "*avoids directing-staff bias, and concurs and supports development*" [MLT-053]. The peer assessment tool, where "*all students complete 360 performance proformas on each-others' performance*" [MPO-032] "*works very well… with fellow cadets appraising each other... and providing honesty…*" [MPO-0310]. Each participant reviews their own performance against the feedback generated by their peers and "*then the instructor discusses differences one-to-one with each and every participant*" [MPO-034]. Indeed, the peer assessment tool "*makes the reporter make 'a call'… it forces judgement calls… which actually avoids unnecessary friction…*" [MPM-031]. The honesty across the feedback is "*most of the time consistent… though can lead to grudges*" [MLT-054] as performance hierarchies emerge and publically acknowledged.

This leads to perhaps the most explicit representation of the meritocracy: the performance ranking system. Each of the syndicates of participants, groups of approximately thirty, has the participants ranked as being 'top', 'middle' or 'bottom' third in relation to their fellow syndicate members. This means that participants are specifically "*graded against peer group*" [MPM-030]. One participant recognised the merits of having the ranking system:

> "*Watching your peers and the ranking creates good competition and motivation*." [MPP04-012]

This point was supported by another participant who identified that "*ranking is a motivation… either gives you confidence or a wake-up call…*" [MPP08-035]. This point was mirrored by the programme owner who stated the "*rankings, stretches them…*" [MLT-059].

Furthermore, due to the proximity of the participants, and the collective share nature of performance:

> "*…few argue with ranking, and indeed ranking relates to rewards… you do well, you receive more praise and rewards… the highest ranking are actually the best… can't argue with it… clear to everyone.*" [MPP08-038]

With regards to discussing and validating the rankings, through objective analysis across multiple rates, "*performance panels sits twice termly*" [MPO-033] within each of the syndicates and across the

programme. These are seen as being hugely important in generating an objectivity and relativity across the participants' rankings.

4.7.3.3 Continuous challenge and scrutiny

A considerable emergent factor in the analysis was the high degree of continuous challenge and scrutiny of participants' performances on the programme. The programme owner and leadership trainer recognised this essential factor; that participants were continuously challenged on a "*daily basis, from morning inspections onwards*" [MLT-042] and that they received a "huge quantity…after every activity" [MPO-037]. One participant identified this systemic application of performance scrutiny "*ensures you continue to do something correctly or that you work on future points*…" [MPP02-011].

Other participants reaffirmed this observation that individual performances were continuously challenged:

> "…*regularly, and about everything you do! Practically daily*…" [MPP05-015]
>
> "…*every appointment I have lead has always been followed by challenging feedback*" [MPP02-012]
>
> "…*extensively, both as individuals and with peers*…" [MPP01-011]

The volume of performance feedback and the length of the programme also allowed participants sufficient time to experience, reflect and alter their performances:

> "...*there is time to change*…" [MPP08-031]
>
> "…*there is always a way back. There is time*…" [MPM-039]

The analysis also provided insight as to how the programme challenges individual performance. Firstly, by utilising an "*intimate coaching and mentoring*" [MLT-045] approach the leadership trainers are focused on "*training them through, not out*" [MPO-040]; and where "*remediation and patience*" [MPO-042] is essential in achieving leadership development. This approach must be safe enough to "*let them to fail: then be debriefed; then allow them to repeat the activity, and then understand how and why it should be better*…" [MLT-010]. The catalyst for facilitating this performance improvement is providing participants with vast volumes of 'challenging feedback'.

The challenging feedback comes from two sources - training staff and peers - and by nature "*holds no punches*" [MPP08-025] and fundamentally "*challenges bad behaviours and conduct*" [MPM-041] during the programme. Participants are "*left in no-doubt; both why and what they need to do to improve*" [MPM-036]. The feedback also "*has authority*" [MPP08-026], whether from the trainers -

because "*their feedback comes from prior feedback and experience*" [MPP08-027] - or from peers - because it is "*easy to trust the feedback of someone you spend 24/7 with*" [MPP08-030]; thus, even if the feedback "*can be hard to swallow, you had to believe it was right*" [MPP08-026].

One participant clearly identified the catalytic role of challenging feedback and future performance:

> "…*knowing that feedback was coming, there was a pressure to act!*" [MPP07-015]

Furthermore, the volume and effect of the feedback was almost wholly positive, even despite its challenging nature:

> "…*the feedback was good…powerful…shocking…but appropriate and relevant*…" [MPP07-017]
>
> "…*should be no sugar coating in feedback regardless of who it goes to*…" [MPP01-013]
>
> "…*feedback was all aimed at what happens from now…where do we go now*…" [MPP08-024]

This did not mean the participants were completely comfortable with having their performance regularly challenged, as "*feedback is difficult; all struggle with constructive criticism*" [MLT-049], and indeed, "*some didn't like being challenged*" [MPP08-028]. However, despite this:

> "…*most people engaged with it… most people were there to perform and succeed… and were generally of a high standard*…" [MPP08-029]

This ability to assimilate challenging feedback and remediate subsequent performance was a hallmark of the highest performing participants, as identified by the leadership trainer:

> "…*cadets like feedback; particularly the good ones*…" [MLT-039]

This is likely linked to the recognition that challenging-feedback "*is not to fail but it is to bring on*" [MLT-048].

The effects of challenging-feedback was evidently positive with regards to leadership development, with participants observing that it facilitated the following factors:

Learning:

> "…*through the feedback you learned more*…" [MPP03-008]
>
> "...*lots of new learning… definitely developed as a leaders*…" [MPP07-006]
>
> "…it does work; they do change…leadership improve on exercises…" [MPM-040]

"…*really breeds a learning mentality*…" [MPP08-033]

Self-awareness and mitigating weaknesses:

"…*self-awareness essential*…" [MLT-050]

"…r*uthless honesty is essential in achieving improvement*…" [MPP01-014]

"…*bringing out your pitfalls has a positive effect, bizarrely*..." [MPP05-018]

"…*even the criticising feedback is helpful… don't get to hear that normally*!" [MPP05-017]

Confidence-building:

"…*ensures you continue to do something correctly or work on future points*…" [MPP02-011]

"…*got a lot from praise...it's inspiring…not all is negative*." [MPP05-014]

"…*step by step you are always achieving your all*…" [MPP02-004]

"…*how to prevail over failure*" [MPO-043]

"…*improves confidence & judgement*" [MLT-060]

"…*constructive debriefing builds confidence*…" [MLT-011]

"…the approach is constructive…" [MPO-037]

Increased appetite for receiving performance feedback:

"…*you begin to crave feedback, as it helps improve you for the sake of others*…" [MPP05-019]

"…*would like to receive more feedback… about what went good and bad*…" [MPP06-014]

"…*there is plenty of feedback, but the more you get, the more you want*…" [MPP06-015]

"…*both positive and negative… I have found useful always*…" [MPP02-010]

The analysis revealed several reasons why the feedback is deliberately of a challenging nature. These include a recognition that there is an archetypal expectation of the developing leaders, as to what they should become; this is both consistent with transformational leadership theory (discussed in Chapter Two) and a systemic, organisational-needs, orientated view of leadership. Where participants must have a strong understanding and application of "*what they aspire to be*" [MLT-047], based upon the ten leadership dimensions and organisational values and standards. Supporting this factor is the need

to develop effective leadership within a safe learning and development environment, as "…*there won't be such good opportunities for reflection and remediation after the programme*…" [MPP06-016].

Important to maintaining continuous scrutiny is the application of a systematic approach to performance review and feedback. The system has certain key characteristics, such as *frequency* - which is daily upwards [MPO-031; MLT-042] - and *format* - which incorporates both formal and informal aspects [MLT-043; MPM-034; MPM-026; MPO-036] and was described by the programme owner as being a "*brilliant system*" [MPO-039]. Informal performance feedback constitutes the daily frequency, and comes from both trainers and peers [MLT-043; MLT-038]. The leadership trainer identified this form of feedback as being "*hot debriefs*" [MLT-038] and verbal in nature. The "*intimacy of the trainers allows huge amounts of verbal feedback debriefs*" [MPM-026].

Participants acknowledged the huge value of this informal feedback, as they relied on instructor judgement [MPM-028; MPM-029] and mentoring credibility [MLT-046], as well as the multi-perspective "…*complementarity with instructors*…" [MPP07-010] - with one instructor (Captain) representing senior (superior) leadership expectations and the other instructor (Colour/Staff Sergeant) junior (subordinate) leadership expectations. This represents both a top-down and bottom-up leadership view. This point was captured clearly by one participant:

> "…*it was extremely valuable getting a soldier's perspective - from the Colour Sergeant – this is very effective… the positive influence is clear*…" [MPP04-014]

The Programme Owner reinforced this factor by acknowledging that despite the colour sergeant is junior to them, he/she "*wants them to develop effectively*" [MPO-038]; this generates what the Programme Owner describes as an "*honest*" perspective to developing effective leadership [MPO-038].

It must be noted that informal feedback also follows a specific performance review and feedback model, called the "*V3 document*", which categorises the ten leadership dimensions and core desirable leadership skills; which the trainers must follow when constructing and delivering performance feedback. Initially, the "*V3 doc supports constructive debriefing*" [MLT-011] during a hot debrief. This is done immediately after an activity and can be done in the presence of peers [MLT-038]. Subsequently, a cold debrief will be conducted with the participant, which will also "…*use the V3, during the cold debrief, where the feedback is even more open and honest*..." [MLT-040]. The cold debrief follows an "*After Action Review format using coaching*" [MPM-027]; this is where the performance feedback builds constructively upon participants' future performance.

Supporting informal feedback are formal feedback methods; these are intended to "*back-up informal feedback*" [MPM-034]. There are two key formal methods: regular 360 reporting and formal written performance reviews. The 360 reporting is conducted within the respective syndicate groups using a ten leadership dimensions matrix, which identifies individual strengths and weaknesses, and is conducted twelve times across the duration of the programme. The Programme Owner described the importance of 360 reporting:

> "*…360 reporting works very well. It provides a great appraising tool, with unavoidable honesty, as these students spend 24/7 with one another and the truth is inescapable… indeed, all students must complete 360 performance proformas on performance… for self-awareness 360 surveys are valuable… they are also utterly linked to 10 behaviours*…" [MPM-032]

The 360 reporting also provides an element of objectivity as "*peers do each other; and each individual on self; and with these results, then the instructor discusses differences one to one with students*" [MPO-034]. This approach provides "*a reality check; a back-up*" [MLT-052] incorporating trainer judgment [MPM-028], "*peer assessment to support development*" [MLT-051] and "*good team work observations*" [MLT-055]. Indeed, the incorporation of observations created out of social interaction and team work provides an important linkage to systemic leadership development.

Formal written performance reviews are conducted six times throughout the programme [MPO-036; MPM-025]; twice every three months [MLT-041]. These reviews incorporate ranking into the performance appraisal, as well as the multifarious artefacts from hot debriefs and 360 reporting. The Programme Manager acknowledged that the reviews are "*qualitative not quantitative*" [MPM-033], however, he defended the robustness of the process by asserting that "*Judgment is fair – and not entirely objective, but it is against a model: ten leadership dimensions and army values*" [MPM-038].

In summary, continuous scrutiny is not inadvertent nor inconsistent, rather systematically incorporated into the programme, through various performance review and feedback methods. These are designed to maintain a high level of intensity with regards to performance improvements and standards attainment. Participants feel the pressure of performance scrutiny and are motivated by this; and see tangible benefits in delivering high performance through the ranking and reporting methods.

Lastly, the effects of continuous challenge and scrutiny of performance potentially generates the sort of impactful life events required by Avolio's (2005) model of leadership development, where the life-stream model of the participants is significantly affected to the point where positive change occurs;

creating new leadership behaviours. This significant change in the life-stream model is indicated by several key observations in the data, and through the general observations of the participants who confess to experiencing life-changing experiences. The programme owner and trainer specifically drew attention to the significant positive change:

> "…*parents and friends recognise the change… the cadets are growing up*" [MLT-058]

> "…*these are enduring things for the rest of your life*…" [MPO-044]

4.7.3.4 Systemic leadership development observations

The analysis of *Element Three: Performance* uncovered several potential factors of influence in generating systemic leadership development.

Firstly, the *discomfort and ostracisation* factor may potentially inhibit systemic leadership development, due to the disengagement of certain participants with the developmental process, and their consequently diminished experience of socially-constructed phenomena. The analysis revealed that participants who were uncomfortable with the prescriptive demands and nature of the programme, experienced a reduction in engagement, and subsequently experienced a degree of ostracisation from the programme. This negative influence has an impact on the ability to create collective synergies and social structures and processes.

The *explicit meritocracy* factor highlighted a potential catalyst in generating acute social awareness of organisational leadership, as well as fostering individual cooperation with systemic needs. The catalyst revealed that explicit standards and clear expectations of participants' performance generates heightened motivation and engagement with the developmental experience across the vast majority of participants. These standards are systemically applied, with all participants being required to achieve the same standards, and rewarded for hitting them. A meritocracy, as to the degree to which individuals exceed the standards, is clearly identified in the explicit ranking process. This ranking process is also fundamentally a socially-constructed process; being a product of team-based experiences, trainer feedback and 360 peer reporting.

The *continuous challenge and scrutiny* potential catalyst revealed a systemic, collectively-orientated approach to challenging performance, by applying a performance feedback system that integrates self-assessment, peer assessment and management scrutiny. This systematic approach generates a certain degree of objectivity and realism that is both persuasive and constructive with participants. The sheer volume of challenging feedback and scrutiny was significant to the point of generating the sort of life-stream impact required to generate effective leadership development (Avolio, 2005). The collective

shared nature of performance review and feedback has a potential catalyst effect in forging and maintaining commitments, feedback and challenge, within collective synergies; and integration with social structures and process; as well as generating holistic social awareness across all three principle factors of systemic leadership development. Also, egoistic illusions appear difficult to maintain in an environment where honest and provocative feedback is systematically delivered to participants, in a hugely transparent fashion.

4.7.4 Element Four: Impact

The analysis of the Fi model *Element Four: Impact* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.14** and subsequently discussed.

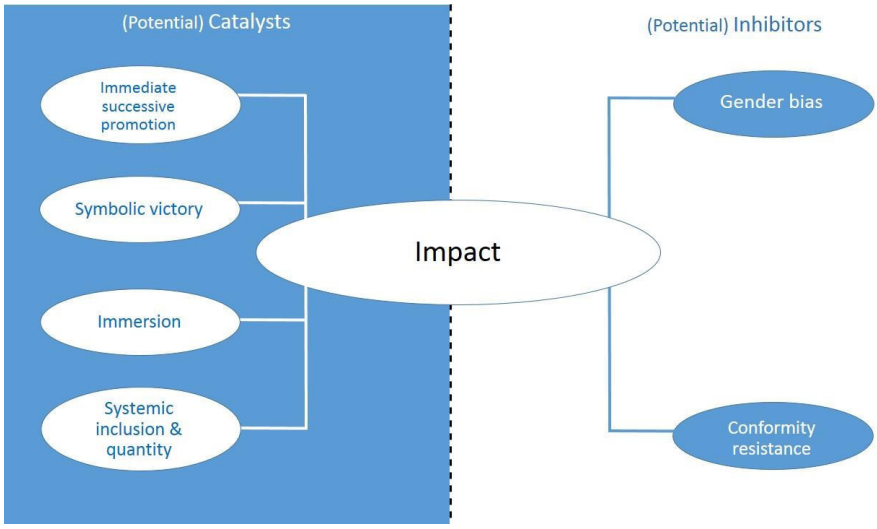

Figure 4.14 - Element Four: Impact Fi Analysis. Source: Author

Inhibitors – Impact

4.7.4.1 Gender bias

The analysis revealed a potential inhibitive factor in the impact of the generalised context for the programme: the standard infantry model. Although it was widely acknowledged to be a strength of the programme, recognised in its enduring usage (c. two hundred years), and also that this model relies predominantly on leadership attributes (visceral) rather than technical (cognitive) knowledge and skills – indeed this point was specifically identified and justified by the Programme Manager:

> "…*the standard infantry model to develop leadership works*!" [MPM-043]

However, it should be noted that at the time of interviewing the participants, infantry leadership roles were unavailable to female participants; this therefore generates a degree of contextual irrelevancy in the development of female leaders. Though the requirement to understand the basics of soldiering are a vital element of being in the British Army, as revealed in doctrine literature, the relevancy was none the less challenged by one of the female participants:

> "…*the course is potentially not female-focused; just infantry focused. It feels like there should be less of the infantry fighting stuff and more intellectual*…" [MPP03-009]

Admittedly, only 8 percent of programme participants were females, however, the analysis did nonetheless identify a potential gender bias in the contextualisation and impact of the programme. It

should be noted that only one of the four female participants recognised this potential gender bias, in utilising the infantry model, and that there was no other evidence of such gender biases in the interview data. However, importantly, it should be recognised that since the participants were interviewed, the British Army has shifted its policy position on female employment in combat roles, which are premised on basic infantry models, and from 2016, female candidates have equal eligibility for leadership roles in combat units. Meaning, it has never been so appropriate, in the history of the British Army, for female leaders to embrace the leadership context of "*infantry fighting stuff*" [MMP03-009].

4.7.4.2 Conformity resistance

The analysis revealed a potential resistance amongst certain participants to conform to the demands and nature of the programme. The resistance appeared to be based on conflicting expectations of the programme and receptiveness to challenging-feedback. One participant captured this potential factor in the observations:

> "…*hard finding common ground for everyone; it depends on expectations*…" [MPP08-021]

And,

> "…*some didn't like being challenged…but most engaged with it*…" [MPP08-028]

However, the analysis also showed that those participants who resisted conforming to the performance expectations (desirable organisational leadership skills and behavioural development) of the programme, experienced less developmental impact:

> "…*the more they fought development, the less the impact had on them*…" [MPP07-020]

This factor appeared to have a negative material effect on generating collective synergies and integration with social and network systems within the syndicate platoons; with those individuals who resisted engagement with the programme experience being ostracised by the rest of the team, as well as purposively withdrawing and restraining themselves from development. Subsequently, those individuals who resisted confirming ended up being ranked at the lowest end of the syndicate in terms of performance.

Catalysts – Impact

The analysis also identified four potential catalysts in *immediate successive promotion, symbolic victory, immersion* and *systemic inclusion and quantity*. These four catalysts are now discussed.

4.7.4.3 Immediate successive promotion

The analysis discovered that having immediate successive promotion available for every participant[6], upon successful programme completion, was a catalyst for heightened developmental impact. This was clearly expressed in the responses across participants and programme management.

Indeed, links to successive promotion are explicit in programme design, with the Programme Manager explaining these links are embedded prior to starting the course, within the selection processes:

> "… (participants are) *selected on potential to carry out their next appointment… the identification of this potential is essential*" [MPM-050]

The objective being that participants achieve what is called 'commissioning'; by successfully completing the programme and assuming subsequent leadership roles; with everything in the programme aligned to achieving commissioning. The Programme Owner expressed the importance of this:

> "…*progression is vital. Simply, it is all about commissioning*" [MLT-061]

The linkages between the programme and promotion were also clear in the participants' responses. One participant expressed that everything they did was "*linked to next leadership role*" [MPP05-012]; mirrored by another participant who stated "y*ou could literally see where your leadership would be applied subsequently*" [MPP07-013]. This alignment with personal development and future appointment within the organisation appeared strong, with multiple participants recognising this:

> "…*the organisation is ready to receive us; and this skill set; we are prepared for it*" [MPP06-18]
>
> "…*we would fit in to the great plan*…" [MPP05-021]
>
> "…*my role within the organisation has changed; presumably for the better*…" [MPP04-017]
>
> "…*enough to feel like just getting on with the next job now…feel ready*…" [MPP06-017]

These responses acknowledge a systemic view of leadership development that elevates organisational needs above personal development needs and desires. Although personal preferences for future appointments are incorporated into the promotion process, the participants are made fully aware that their needs come second to those of the organisation; and furthermore, that the organisation has a "great plan" [MPP05-021] which can be trusted.

[6] One hundred percent of programme graduates receive a promotion appointment after successful completion.

Indeed, having a clear and guaranteed outcome of successful programme completion for participants, which is linked to organisational development needs, creates an important link between egoistic, local development needs and collective, social development needs. Immediate successive promotion appeared to encourage programme compliance and motivation and organisational imperatives buy-in; thus being a strong potential catalyst for systemic leadership development.

4.7.4.4 Symbolic victory

Another potential factor of influence, which positively affects the development of systemic leadership development, was the symbolic victory of 'commissioning' at the completion of the programme. The commissioning process involves elaborate ceremony and pomp; where participants receive physical representations of their subsequent promotions (uniforms and regalia) and conduct a ceremony over-watched by senior leadership and dignitaries. The process involves considerable praise and celebration. This potential catalyst creates a definitive milestone, where participants can be assured they have met the expected standards; become part of a new peerage and social network; and achieved meaningful leadership development (against organisational imperatives and developmental needs). By completing the process they are deemed "*ready for commissioning*" [MPP08-045] having met the "*syllabus objectives and been validated against them*" [MLT-062]. The symbolic process of commissioning reflects the fact that participants are "*fit to commission*" [MLT-064], with all development processes culminating in this validation: hot and cold debriefs, Personnel File (with full records and written work) [MLT-064]. With regards to achieving the symbolic victory of commissioning, one participant exclaimed: "*the organisation is ready to receive us; and this skill set; we are prepared for it*" [MPP06-18].

4.7.4.5 Immersion

The analysis also revealed a potential catalyst in the immersive nature of the programme. Participants were utterly immersed in the developmental experience, where there was purposefully a "*heavy training burden, but worthwhile and effective*" [MLT-066]. In this particular case, the immersion was 24/7 whilst conducting the programme. Indeed, programme management acknowledge that time and social proximity are key factors in developing effective leadership among the participants. This was due to multiple factors, such as:

Amount of time; allowing practice, repetition and embedded learning:

> "*…one year really works. You need that amount of time for exploring through practice… you definitely see improved leadership, even through simple leadership tasks… the repeated practice hones it* (leadership)*, without even realising it… it allows contextualised learning;*

where cadets can learn from mistakes… practice and practice… it also allows them to be pointed in right direction regarding values and standards articulation; to the point where they really do live and breathe it… living the "serve to lead"; not arrogance but real servant leadership… putting people first and showing moral courage…" [MPM-044]

Levelling out participant disparities in prior leadership development:

(Regarding the importance of large amounts of time spent on the programme) "…*those who haven't developed prior to here it is much more important… it levels out the playing field*" [MPO-048]

Social-constructivist nature of leadership development:

"…*leadership is made by the people we meet on the journey*" [MPO-047]

These factors were identified as being linked to the large volume of time participants spend immersed in the programme. The year-long-residential factor appeared to have a strong impact on the participants, in terms of personal development, as reflected across participant and programme management observations:

"…*the impact on individuals is great, either way… make or break*…" [MPP08-039]

"…*don't realise it, but it must be significant, as I started to think and act different*…" [MPP04-015]

"…*parents and friends recognise the change…growing up*" [MLT-058]

The immersive factor also appeared to focus participants' minds on organisational leadership imperatives; creating a single-mindedness in desirable leadership approaches; one which purely fits into the British Army's view of organisational leadership. Other notions were deemed both irrelevant and inappropriate. The immersive environment facilitated a degree of institutionalisation with regards to leadership notions amongst the participants; indeed, limiting their view to purely programme-led definitions and applications. This institutionalisation principle was also reflected in the following potential catalyst: *systemic inclusion and quantity*.

4.7.4.6 Systemic inclusion and quantity

The analysis also provided valuable insight as to how the programme potentially impacts systemic leadership development via two inter-related factors: systemic inclusion and quantity (of development). The systemic inclusion factor involves the commitment that nearly all mid-level (officer rank) leaders in the organisation are mandated to conduct this programme. This represents a critical-

mass approach to developing effective organisational leadership; where practically all mid-level leaders have developed the same skills and behaviours, and think and speak the same. This systemic inclusion revealed a noticeable degree of institutionalisation on the programme, where conformity and change were key elements of successful development. This factor was evident across participants' observations:

> "*…you put up with the challenges and hardships, because all of the others before you have endured it… it's a rites of passage…*" [MPP08-0460]
>
> "*…you trust the system, because it's so organised up to this point…*" [MPP08-044]
>
> "*…the impact was geared towards the military; we would fit in to the great plan…*" [MPP05-021]
>
> "*…the army knows what it wants…because that works…so we fit the mould*" [MPP08-042]
>
> "*…the values bit is so clear that you change or you leave…*" [MPP08-040]
>
> "*…you don't lose your soul, but you change your mind-set…*" [MPP08-043]
>
> "*…the programme is set up to help us feel and see the progression…*" [MPP03-011]
>
> "*…don't realise it, but it must be significant, as I started to think and act different…*" [MPP04-015]
>
> "*I believe all of my development has come through this programme*" [MPP02-013]

The systemic inclusion factor - and within that, institutionalisation - supported the drawing-in of participants into the wider organisation, through fostering systemic group cohesion and team building. This point was accentuated by the Programme Owner who reflected "*group cohesion endures until they die… they are part of the officer corps… Walking down the street; see them, side by side*" [MPO-053]. This significant, life changing impact, was also reflected in the participants:

> "*…more than enough impact, for sure*" [MPP05-020]
>
> "*the impact increased over the year and beyond*" [MPP07-018]

This systemic inclusion is supported by vast quantities of time conducting leadership development. Participants are on the programme for forty eight weeks, each week consisting of six working days, with roughly sixteen hour working days; equally an approximate total of over four and a half thousand hours of development – roughly half the total suggested time required to develop expert leadership (Day, 2011). This significant quantity of learning and development results in a "*heaving training burden,*

but worthwhile and effective" [MLT-066] where "*one year really works*" [MPM-044]. The large quantities of time and interaction allow for the sort of meaningful developmental impact identified by Avolio (2005) and Day (2011).

4.7.4.7 Systemic leadership development observations

The analysis of *Element Four: Impact* revealed several potential factors of influence in generating systemic leadership development.

Firstly, the *Gender bias* factor revealed that systemic inhibitions may exist in the generalised context of the programme, specifically using the standard infantry model, which is directly linked to future roles which only male participants can assume; meaning that impact, for female participants, may be limited in terms of developing direct future integration with organisational development and social networks. This is not a considerable concern as elements of the standard infantry model are broadly applicable across all army disciplines, such as leadership behaviours (including values and standards), problem solving and planning; and also that just eight percent of participants were in fact female.

Secondly, the *Conformity resistance* factor revealed a potential inhibition with regards to developing collective synergies, as well as integration with social and network systems, within the syndicate platoons, as certain participants' resisted learning and development, and subsequently were ostracised from the team and experienced relatively poor overall performance.

The *Immediate successive promotion* factor revealed a clear potential catalyst for generating systemic leadership development; where providing immediate promotion for every participant satisfies systemic organisational needs, as well as personal development needs and desires. The organisation identifies promotion opportunities that match organisational development imperatives and gaps, whilst taking into account social awareness needs of each respective role (i.e. matching participants with differing social contexts). Moreover, having a clear and guaranteed outcome of successful programme completion creates an important link between egoistic, local development needs, and collective, social development needs.

The *Symbolic victory* catalytic factor revealed a definitive systemic milestone, where participants can be assured they have met the prescribed standards expected for organisational leadership, and thus become part of a new team and social structure and network. This achieved meaningful leadership development, against organisational imperatives and developmental needs.

The *Immersion* factor potentially supports socially constructed systemic leadership development; where development is relational and collective. Within this immersive environment, social and

network systems (such as command appointments and operational command structures) replicate real-world environments for leadership development; as well as generate considerable team building and commitment. Social awareness, with regards to organisational leadership needs and expectations, is heightened through this immersion. The immersive factor also appeared to focus participants' minds on organisational leadership imperatives; creating a single-mindedness in desirable leadership approach; one which fits into the British Army's view of organisational leadership. Other notions were deemed both irrelevant and inappropriate. These notions were then reinforced and integrated holistically into the all-encompassing immersive experience.

The *systemic inclusion and quantity* factor revealed a critical-mass approach to developing effective organisational leadership, where attendance is mandatory for mid-level leaders, therefore capturing the vast majority of leadership roles for development, and where institutionalisation was evident. The sheer volume of leaders coupled with the vast quantity of time conducting the programme has the potential to be strong catalyst for systemic leadership development. This was evident in the responses of the participants, who described significant re-alignments of personal views of leadership towards organisational views, and where organisational needs trump individual egoistic ones. Furthermore, this factor potentially supports the drawing-in of participants into the wider organisation, through fostering systemic group cohesion and team building, and prescriptive direction and alignments with organisational development needs.

4.7.5 Element Five: Values Integration

The analysis of the Fi model *Element Five: Values Integration* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.15** and subsequently discussed.

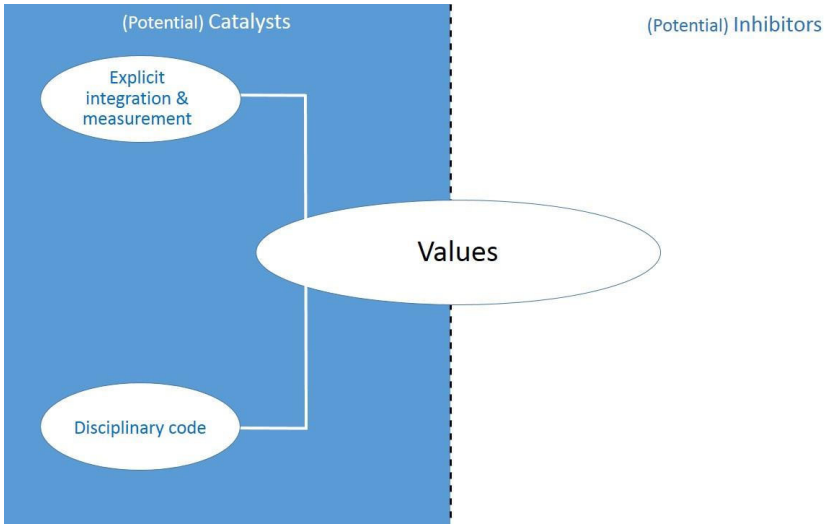

Figure 4.15 - Element Five: Values Fi Analysis. Source: Author

Corporate artefacts revealed the organisation has five corporate values (UKMoD, 2008):

1. **Selfless Commitment**: Personal commitment is the foundation of military service. British Army leaders must be prepared to serve whenever and wherever required and to do their best at all times. This means putting the needs of the mission and of the team before personal interests.

2. **Courage**: Soldiers must be prepared to take the lives of others, and knowingly to risk their own. They may need to show restraint, even when doing so involves personal danger. This requires physical and moral courage.

3. **Discipline**: The British Army must act as a disciplined force, where orders are carried out, and that everybody is confident that they will not be led down by their comrades. Discipline is supported by team loyalty, trust and professionalism. This discipline system must be fairly applied both on and off duty.

4. **Integrity**: For the British Army, integrity means being honest and truthful. All forms of deceit and dishonesty call into question whether an individual can be relied upon, damaging the team and operational effectiveness. Integrity also demands that those who are in positions of authority set the highest standards and are fair and consistent to their subordinates.

5. **Loyalty**: Loyalty binds all ranks together, turning individuals into teams, creating and strengthening the formations. Those in authority must be loyal to their subordinates:

representing their interests faithfully, dealing with complaints thoroughly and developing their abilities through progressive training. Subordinates must be loyal to their leaders, their team, and their duty.

Catalysts – Values

4.7.5.1 Explicit integration and measurement

The analysis revealed a potential catalyst in the clear and explicit integration of the values into programme design and delivery. The values were not viewed as some extrinsic, corporate ideology, developed elsewhere, either via recruitment and selection processes or extracurricular training and development, but were explicitly woven intricately into "*everything*" [MPP08-047]. The programme owner drew particular attention to this explicit integration: "*they are woven into every single experience… with the objective to understand the values… feeding in little dilemmas that will bring out other values*" [MPO-056]. This factor was evident in reflections of other programme management team members; with the programme manager exclaiming that the values were "*absolutely*" [MPM-054] integrated into the programme, indeed, "*it's rammed down their throats*!" [MPM-054]. The leadership trainer mirrored this observation, stating of values integration: "*…it's in everything the cadets do*" [MLT-067], "*…from dress code to supporting peers…*" [MLT-068].

The evidence for this explicit integration was correspondingly clear in the participants' responses:

> "*…it's all about the core values…*" [MPP05-001]
>
> "*…the core values are everything; and they get hammered home…*" [MPP07-001]
>
> "*…the army's ethos and values are vital to effective leadership…*" [MPP01-016]
>
> "*…everything is about values…they are drilled into us…know them by heart and get them*" [MPP02-014]

Furthermore, the analysis revealed that measurement, as to the degree to which participants adopt and demonstrate these values, supported their effective integration across the programme. The fact that participants would be scrutinised and assessed provided a potential catalyst for values development. Indeed, the programme manager stipulated that the programme was designed specifically so that "*they* (values) *will be subsequently challenged*" [MPM-057], where participants would be given leadership challenges and appointments throughout the programme to measure those values, and confirm their application and authenticity. This latter point, of authenticity, is important, so as to avoid game-playing and deceitful conduct. The leadership trainer recognised this challenge,

and the role of measurement value-based conduct, when he observed that "*honesty is key… testing this all the time*" [MLT-069].

4.7.5.2 Disciplinary code

The analysis also showed a potential catalyst in the commitment to enforce corporate values with a strict disciplinary code. This code outlined that any behaviour or conduct which revealed a fundamental flaw in a participant's application and demonstration of the values resulted in considerable extra scrutiny, testing and possible removal from the programme. The disciplinary code was not merely a hollow threat, but was regularly being applied, with wide-ranging infamy. Participants were unambiguous as to the reason for the disciplinary code; they felt they were being "…*hammered with values… because it's the law*…" [MPP05-021], where participants "*break them at your own cost*" [MPP08-051]. Within this particular case study programme, three participants had been removed from the programme, earlier in the year, for failing to demonstrate the corporate values: one for lying ('integrity' issue), a second for disorderly conduct ('discipline' issue) and a third for repeated self-centred behaviour ('selfless commitment' issue). Indeed, the programme manager revealed that perhaps a dozen more participants were going through the disciplinary process at that time for values related issues.

The reasons for enforcing a disciplinary code to scrutinise values development was clear in the analysis, and rests firmly in transformational leadership theory, and the importance of idealised influence (Burns, 1978). The participants recognised that "*values is linked to reputation*" [MPP03-012] and that "…*you are a person, like the follower, all the same… you must respect that… it's about leading by example… as an exemplar of what is right, this is key*…" [MPP04-018]. Having "*self-discipline… setting an example… and serving to lead*…" [MPP06-013] allows leaders to have positive influence on followers and "*maintains morale and fairness… and leads to the ability to do the difficult thing*…" [MPP08-049]. The participants were unequivocal regarding the needs to develop and enforce the values, and as such were unanimously conformist in their conduct and development.

Also the robustness to which the values are enforced appears to increase the efficacy of their development. This is consistent with Avolio's Lifestream Model (2005) where significant challenge increases the impact of leadership development. This perpetuation was described succinctly by onne participants:

> "…*you don't forget the values nor the anecdotes*" [MPP08-050]

It was thus apparent from the analysis that corporate values were extensively and effectively integrated into the programme, using a systemic view of consistency across all participants, as to the

communication and development of those values, but also the confirmed adoption and demonstration of them from the participants. Values integration and development was not seen as a devolved, subjective or incidental development issue, but rather systemically applied: setting direction in terms of team and organisational needs – purposefully forging commitments and reciprocity through the programme. This approach is consistent with a systemic view, of a shared collective experience, with the aim of developing team synergies, organisational development and cooperation with social structures and systems. The approach to values integration within this programme was one that is significantly, and clearly, orientated towards organisational needs, rather than succumbing to egoistic desires and needs of participants.

4.7.5.3 Systemic leadership development observations

The analysis of *Element Five: Values integration* revealed several potential factors of influence in generating systemic leadership development.

Firstly, the *explicit integration and measurement* factor revealed a systemic approach to values-development, where their development was deeply embedded into almost every activity of the programme, across design and delivery. Furthermore, their integration was an explicit element of the programme, which no participant could evade, and against which all were measured. Also the values were intrinsically linked to wider organisational needs and provided an organisational leadership 'golden thread' and systemic application. Consequently, the inherent approach to values-development within the programme was less about egoistic development, and more about collective, organisational development.

Secondly, the *disciplinary code* factor creates an expressively strong social awareness across the participants as to the organisational and social imperatives of corporate values. The high level of scrutiny and enforcement, with regards to values-demonstration and –development, reflects the wider organisational commitment to giving strong direction and demanding individual alignment with social and organisational imperatives. This strategic consistency supports integration of the programme with wider organisational social and network systems, where the corporate values are also being scrutinised and enforced using a strict disciplinary code. This shows a collective orientation at the highest level: across the whole organisation.

4.8 Case Study B - Inferential linkages to systemic leadership development

4.8.1 Extrapolating potential systemic leadership development linkages

As with the within-case analysis approach of Case Study A, the data analysis demonstrated a significant number of potential linkages between the data and systemic leadership development. Similarly with the previous case, the researcher repeatedly reviewed audio files and written transcripts, and triangulated with observations and artefacts, identifying potential impact linkages with the systemic definition.

Table 4.3 below demonstrates the volume of potential linkages, between the observations of the participants and the differentiated elements of the systemic leadership development definition. Identifying these potential linkages generated a degree of awareness within the researcher as to significant areas of interest for subsequent deeper analysis.

	Potential linkages: systemic leadership development												
	Collective synergies					Organisational development				Social structures and processes			
Interview Source data	Team building	Forging and maintaining commitments	Trust, cooperation, goodwill and reciprocity	Feedback and challenge	Social awareness	Setting direction and alignment	Social and organisational imperatives	Cultural development	Social awareness	Integration with social and network systems	Fostering cooperation, coordination and networks	Social awareness	TOTAL
Programme Owner	20	36	31	36	19	24	41	17	17	29	21	21	312
Programme Manger	44	54	51	41	31	44	47	33	41	43	49	45	523
Leadership Trainer	32	49	42	48	37	37	37	17	37	33	24	37	430
Participant 1	08	14	14	11	12	14	16	10	11	11	09	11	141
Participant 2	08	14	13	08	08	10	14	08	10	09	11	09	122
Participant 3	08	12	09	09	08	12	12	08	09	11	10	09	117
Participant 4	16	18	18	11	18	11	14	14	12	15	18	17	182
Participant 5	12	20	17	14	16	11	11	13	14	09	11	14	162
Participant 6	12	15	17	14	15	10	12	16	10	10	12	14	157
Participant 7	16	17	16	14	17	12	14	15	12	11	14	16	174
Participant 8	38	53	47	47	52	36	39	32	41	40	35	45	505
TOTAL	214	302	275	253	233	221	257	183	214	221	214	238	2825

Table 4.3 - Potential Linkages: Systemic Leadership Development. Source: Author

As with the previous case, the volume of potential linkages does not indicate whether the comments included positive or negative statements regarding efficacy, nor whether the respondent explicitly identified factors of influence; rather they indicate possible inferential linkages to the systemic leadership development definition, as identified by the researcher when interpreting the data. However, it is important to note that Case Study B had significantly more potential linkages, despite

the fact the interviews were on average shorter that Case Study A. Like the previous case, analysis of whether certain potential linkages had a positive or negative influence on systemic leadership development were analysed in detail in the case study analysis within the chapter.

A key difference between the case studies was the breadth of potential linkages; Case Study B had a more consistent and even spread distribution. This meant that potential factors of influence for systemic leadership development may be observed across all themes.

However, four particularly rich areas of interest for the researcher were:

- *Forging and maintaining commitments*
- *Trust, cooperation, goodwill and reciprocity*
- *Social and organisational imperatives*
- *Social awareness of extrinsic structures and processes*

These were of particular interest as the analysis revealed consistently rich insights as to potential factors of influence. These potential factors have been discussed in detail throughout this chapter, within each of the systemic leadership development observations sections. Furthermore, the significance of these particular aspects is discussed more in Part Four within the cross-case analysis and research discussion.

Indeed, the *Fi* analysis within this chapter delved into these potential linkages in detail, and identified some possible reasons for the volume of references in the transcript data, and what influential factors might be drawn from the analysis. These are highlighted now in the summary.

4.8.2 Summary of Case Study B: Factors of influence analysis

In summary, the within-case factors of influence analysis identified nineteen factors of influence across the five elements. The factors of influence are demonstrated in **Figure 4.16** below

These cover a broad range of systemic factors of influence and demonstrate potential inferential inductive links between cardinal themes of leadership development efficacy and the pragmatic realities of the case study. They showed that fundamental issues have the potential for significant impact. These factors provide a valuable picture and awareness for the subsequent cross-case analysis.

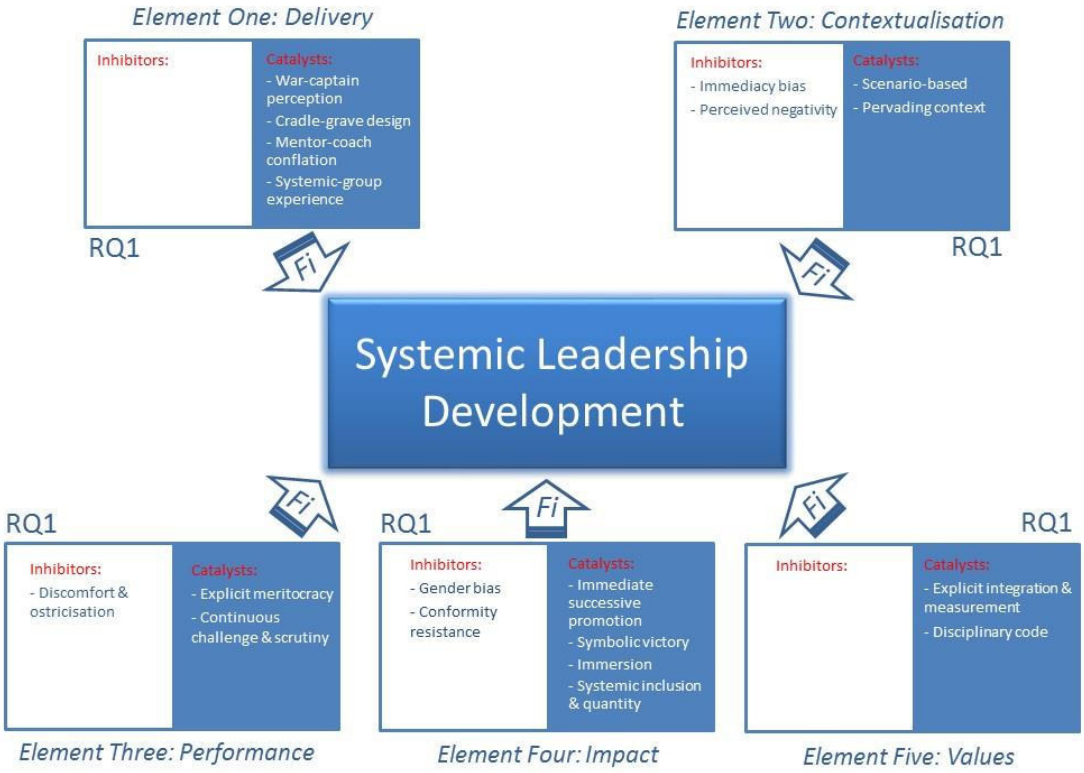

Figure 4.16 - Case B: Systemic Leadership Development Fi Model. Source: Author

The potential factors demonstrated above in the Fi model revealed both positive and negative influential factors for systemic leadership development.

The respective linkages to which aspects of systemic leadership development they potentially affect is demonstrated below in **Table 4.4**. The potential inhibitors represent possible negative effects; and the catalysts potential positive effects. This table clearly shows a potentially significant array of influencing factors for generating systemic leadership development.

As with Case Study A, the findings of this case should not necessarily be generalised to other military organisations based on the data alone. However, the Fi model proved to be an effective case study analytical tool for analysing the emerging observations across the cardinal elements. Thus, the analytical model was not altered before being applied to the validation study.

The following Parts of the chapter now go on to review the findings from the validation study and then to conduct cross-case discussion, leading on to recommendations and findings.

Element	*Fi* Inhibitors	*Fi* Catalysts	Influenced aspect of systemic leadership development												
			Collective synergies					Organisational development				Social structures and processes		
			Team building	Forging and maintaining commitments	Trust, cooperation, goodwill and reciprocity	Feedback and challenge	Social awareness	Setting direction and alignment	Social and organisational imperatives	Cultural development	Social awareness	Integration with social and network systems	Fostering cooperation, coordination and networks	Social awareness
Delivery		War-captain perception	X	X	X	X	X	X	X	X	X	X	X	X
		Cradle-grave design	X	X	X		X	X	X		X	X	X	X
		Mentor-coach conflation	X	X	X		X	X	X		X	X	X	X
		Systemic-group experience	X	X	X	X	X	X	X	X	X	X	X	X
Contextualisation	Immediacy bias			X			X	X	X			X		X
	Perceived negativity		X	X	X	X	X			X	X		X	X
		Scenario-based	X		X	X	X	X	X		X	X	X	X
		Pervading context	X	X			X	X	X	X	X	X	X	X
Performance	Discomfort & ostricisation		X	X	X	X	X			X			X	
		Explicit meritocracy		X		X		X	X		X			
		Continuous challenge & scrutiny	X	X	X	X	X	X	X	X	X	X	X	X
Impact	Gender bias		X	X			X		X	X	X	X	X	X
	Conformity resistance		X	X	X	X	X		X	X	X		X	
		Immediate successive promotion	X	X	X	X	X	X	X	X	X	X	X	X
		Symbolic victory	X	X	X		X			X	X	X		X
		Immersion	X	X	X	X	X	X	X	X	X	X	X	X

Element	*Fi* Inhibitors	*Fi* Catalysts	Influenced aspect of systemic leadership development											
			Collective synergies					**Organisational development**				**Social structures and processes**		
			Team building	Forging and maintaining commitments	Trust, cooperation, goodwill and reciprocity	Feedback and challenge	Social awareness	Setting direction and alignment	Social and organisational imperatives	Cultural development	Social awareness	Integration with social and network systems	Fostering cooperation, coordination and networks	Social awareness
Impact (continued)		**Systemic inclusion & quantity**	X	X	X	X	X	X	X	X	X	X	X	X
Values		**Explicit integration & measurement**	X	X	X	X	X	X	X	X	X	X	X	X
		Disciplinary code		X		X	X	X	X	X				X

Table 4.4 - Case B - Systemic Leadership Development-Fi Analysis: Aspect Linkages. Source: Author

PART THREE – WITHIN-CASE STUDY ANALYSIS (VALIDATION STUDY)

4.9 Introducing the Validation Study

Part Three will discuss the findings from the research analysis, covering organisational leadership and cardinal themes of leadership development; looking at which factors of influence, through applying the Fi conceptual analytical model, potentially generate systemic leadership development.

4.10 Validation Study – Understanding Organisational Leadership

The researcher questioned the focus group to make observations regarding the differing nature of organisational leadership across their military and energy sector experiences. This was to identify any key differences between the sectors and any situational or contingency challenges for leadership development.

The analysis revealed two key factors of influence for organisational leadership across the two sector examples; a potential catalyst in *enforcing social values*, and a potential inhibitor in *technical-results driven* (**Figure 4.17**). The analysis will now discuss the potential impact of these factors on organisational leadership and leadership development.

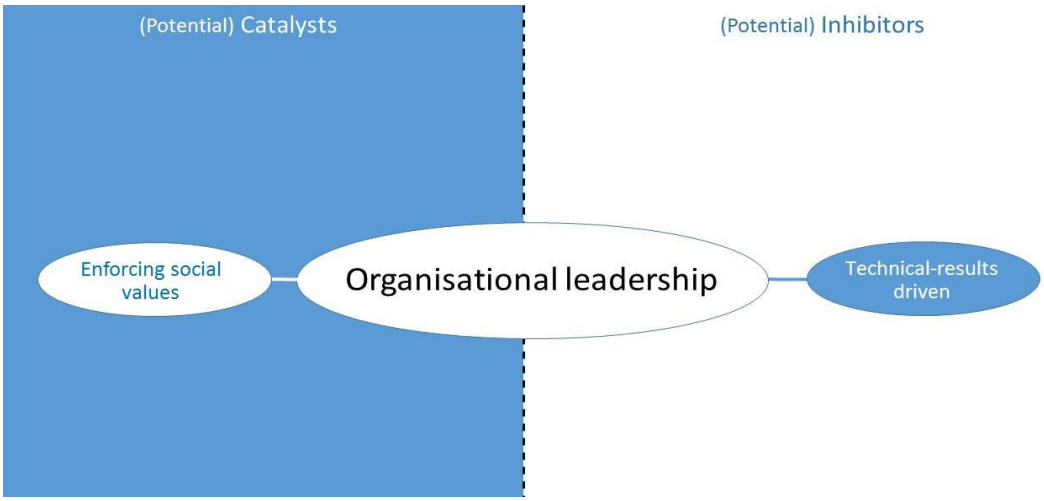

Figure 4.17 - Organisational Leadership Fi Analysis. Source: Author

Inhibitors – Organisational leadership

4.10.1 Technical-results driven

The focus group respondents revealed a strong recognition for the primacy of technical expertise and experience within the energy sector compared to the military. This orientation was profoundly more obvious in their energy sector experiences, despite the commonality in both experiences requiring considerable technical expertise (it is important to note that all three ex-army officers were employed

within heavy equipment and technical disciplines in the military – see **Table 4.9**). The difference in technical orientation was explicit in one participant's response:

> "*In the army, training is all about leadership development with some subject matter expertise. Any training in industry is about subject matter allowing leadership to develop in slow time. [Name of Case Study B] makes leaders first, but at the same time skills you in the relatively trivial specialist skills, first aid, weapon handling, LOAC etc. It's the other way round in the oil business. The subject matter stuff is the most important bit. Leadership in many ways comes from one's ability in engineering, finance, commercial, selling etc*." [VL01-046]

Although this orientation was not specifically seen as being negative, the respondents identified a potential negative effect in social constructs of leadership and what effective organisational leadership looks like:

> "*But this really reflects the oil patch, which is all about what you know and your experience on the job. There is little celebrated about people skills. They are seen as being childish and for other sectors. This is also reflected in the way that seniority and promotion are seen as a technical issue. It's all about what you know. That gets you more seniority. Man management experience is incidental. It's all about technical. Competency based… The military is not perfect of course, but in this point, about valuing good leadership and praising it, they are exemplary. Industry focuses on technical credibility and experience*." [VL01-0001]

This technical skills and expertise orientation potentially leads to driven behaviours, where leadership is a local, human capital issue, where the leader validates performance based on results and knowledge, rather than on socially-beneficial, emotionally intelligence, transformational interactions. This monotonous definition of leadership leads to a technical-results driven paradox for leadership development:

> "*This actually reveals a considerable challenge for leaders in oil and gas companies. That is, the emphasis and rewards, both physical and emotional, are all linked to what you do, not how you do it. The method of leadership is never scrutinised*." [VL03-001]

A focus on outcomes and results, the *what*, rather than the method of approach and positive SAEI leadership interactions, the *how*, potentially creates a task-orientated, management driven approach; where day-to-day anthropocentric interactions are not valued, but are secondary to results-delivery. This observation was re-enforced by one participant:

> "*…the issue of focusing on what you do, not how you do it, encourages managers to do things right, not the right things; morality and values are second placed to achieving business ends. Get it done, prove it, success… In this sense, management is assessed or measured, but leadership interaction is not scrutinised*." [VL03-002/003]

This lack of scrutiny of leadership potentially leads to an irrelevance or disconnect in leadership development initiatives; as the rewards for behavioural change and transformational interactions are not extant in the real-world, therefore, motivation to apply them is less than motivation to deliver results based on technical know-how.

An example of when a significant leadership issue has been viewed, and then re-categorised, as a technical, management issue within the energy sector is with the safety corporate value:

> "*…safety is the only leadership value of significance. But it must be stated, that in oil companies, safety is mostly seen as an operational process thing, not really behavioural*." [VL03-005]

This mechanistic, rather than agency, management approach to safety is discussed later under *Element Five*.

Furthermore, the technical-results driven leadership approach may have a considerable negative impact on systemic organisational leadership, as it focuses on egoistic human capital development, with the emphasis is on personal power and knowledge (Day, 2001), rather than relational, where collective synergies, organisational development and collectively beneficial social structures and processes are not paramount.

Indeed, the ultimate reward for aspiring managers – promotion - may indeed suffer negatively from this technical-results driven leadership focus, as one participant observed:

> "*This is also reflected in the way that seniority and promotion are seen as a technical issue. It's all about what you know. That gets you more seniority. Man management experience is incidental. It's all about technical. Competency based."* [VL01-007]

This factor may actually lead to managers being promoted who display little effective leadership qualities:

"*…sometimes there are even terrible man managers, right up there at the top of the* ladder." [VL01-009]

One participant provided a possible reason for this technical-results driven approach to leadership within the energy sector:

"*This is because the industry is risk averse, in the extreme. Not just with HSE, but with everything. It probably hasn't always been this way. I am sure in the beginning, the frontier years, the industry was taking huge risks and leadership was practiced daily. But this has diminished almost completely in recent years. Everything is geared to play-it-safe. Don't be a risky man-manager or leader; play it safe by delivering on your targets and getting the job done. No one likes risk. I spoke to a head hunter recently about a particular role that we needed filled and I asked him which candidates were in high demand at the moment, across the mid-senior levels, and his answer was one word, 'safe'.*" [VL02-010]

Thus, potentially, in the extremely risk averse corporate environment within the energy organisations, leaders are unlikely to participant in activities outside of their expertise and control, where risk cannot be attentively managed. Furthermore, there may be little means of rewarding them even when they do, as they are not actively measured and scrutinised beyond their technical and results responsibilities.

Interestingly, risk was not perceived the same in the military, despite the hazardous nature of its activities. Rather, risk was seen to be directly mitigated by leadership behaviours embodied in the corporate values. In the military, leadership, not management, mitigates risk.

Catalysts – Organisational leadership

4.10.2 Enforcing social values

The analysis revealed in the military a fundamental aspect of organisational leadership was the enforcement of social values. Values are truly systemic and relate entirely with human behaviours and leadership interactions. They are explicitly leadership issues; not business ends or strategic imperatives. Moreover, they are seen as social issues, developed and scrutinised in the public arena. This point was identified by two of the participants:

"*The military utterly, from cradle to grave, scrutinise leadership. At it is done very publically. It's seen as a social issue; built and critiqued in the social space. But this is not the case in industry*." [VL03-004]

"*The military nails the social nature of values. This is probably due to the public discussion and scrutiny that accompanies them*." [VL02-058]

This directly situates organisational leadership in the social capital domain, where there is direct inferential linkages between leaders' behaviours and development and systemic leadership development needs. A SAEI leadership perspective is endorsed by this potential catalyst, as collective synergies are generated through forging and maintaining social commitments, cooperation and reciprocity; social imperatives within organisational development are maintained, with a strong cultural and social awareness; and effective social structures and processes are established through fostering cooperation with systemic organisational needs and feedback.

4.10.3 Systemic Leadership Development Summary

The analysis in this section revealed some key factors within organisational leadership for creating systemic leadership development. Indeed, the two factors of influence represent polarised positions with regards to developing collective and relational leadership development rather than egoistic leader development. Yet, these polarised factors may present a paradoxical tension in leadership development, where the needs of the individual and organisation can both be represented, yet still have the potential to inhibit effective systemic leadership development.

The first factor of influence, *technical-results driven* leadership may have a considerable negative impact on systemic leadership development, as it focuses on egoistic human capital development, where the emphasis is on leaders' personal power and authoritative knowledge, rather than relational and collective development. Despite the apparent desire to deliver high performance through this orientation, this factor of influence may actually stifle leadership attributes, placing greater emphasis on management and technical competencies. Indeed, perhaps even relegating leadership to the category of superfluous or even unnecessary.

Conversely, the potential catalyst of *enforcing social values* appears to force organisational leadership into the social capital domain, creating direct inferential linkages between leaders' behavioural development and systemic leadership development needs; where collective synergies are potentially

generated through forging and maintaining social commitments, cooperation, feedback and reciprocity; social imperatives within organisational development are responsibly enforced, with a strong cultural and social awareness; and effective social structures and processes are established through fostering cooperation with systemic organisational needs.

4.11 Validation Study – Fi Thematic Analysis: Catalysts and Inhibitors

The within-case analysis will now specifically critically discuss the cardinal themes from the literature review (Chapter Two), which in turn generated the thematic elements of the Fi Model (Chapter Three), and were reflected in the Research Question One. The only amendment to the process, in relation to the other cases, was the participants were asked to make comparative observations on each of the thematic questions.

The Fi model will now be applied to each of those elements, by asking Research Question One (RQ1):

> **RQ1**. *Systemic leadership development is influenced by which factors, across the cardinal themes of inquiry?*

4.11.1 Element One: Delivery

The analysis of the Fi Model *Element One: Delivery* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.18**.

The analysis revealed two important factors of influence for the delivery of leadership development across the two sector examples; a potential inhibitor in *lack of credulity and realism*, and a potential catalyst in *authority and connectivity*. The analysis will now discuss the potential impact of these factors of influence.

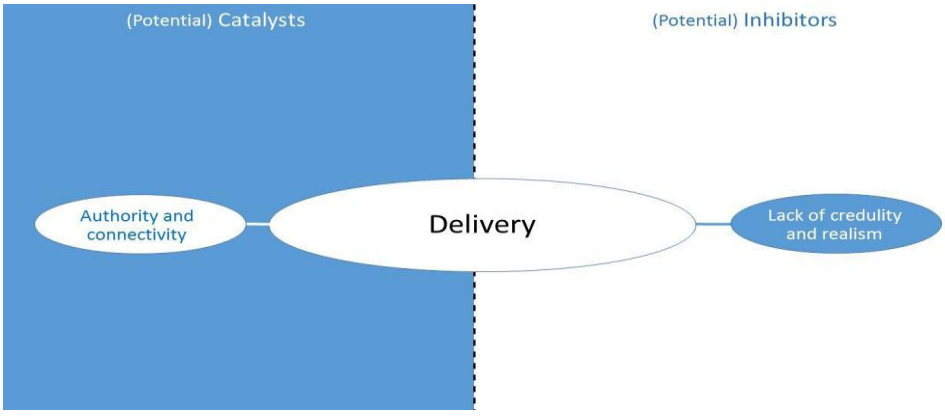

Figure 4.18 - Element One: Delivery Fi Analysis. Source: Author

Inhibitors – Delivery

4.11.1.1 Lack of credulity and realism

The analysis showed a potential inhibitor in the apparent lack of credulity of leadership trainers and their ability to connect learning and development with the realities of the working environment. The

focus group respondents identified differentiation between the selection and appropriateness of military trainers versus industry trainers. The criticisms were not statements of preference or congeniality, indeed participants expressed dislike for military leadership trainers more often than their industry counter-parts, rather the statements were regarding the efficaciousness of the training delivery in developing leadership in the programme participants. In this regard, the focus group identified a negative issue within the energy industry programmes: a lack of credulity and realism with the trainers.

There were several inter-related reasons for their apparent lack of credulity and realism, such as the relevance of their own contextual experiences and knowledge, which were often outside of the particular industry:

> "*…the problem in the oil industry is that the trainers very rarely come from either the company or the current operating environment. They are external consultants. Often with abstract expertise*." [VL02-011]

And even if they are from within the industry their experience is often outdated and irrelevant:

> "*And if they did have relevant experience that was ions ago; sometimes even pre-cyber offshore. So they literally know nothing of the challenges and demands*." [VL02-011]

This disconnect with reality appears to undermine trainer credulity with regards to understanding and directing the development of appropriate leadership skills and behaviours. In a plain sense, it lacks realism. This realism issue was further expounded by another respondent:

> "*The generic content about behaving like a good guy leader or whatever, this stuff is obvious, so what? What does it mean for my world? Not sure that is done well. Know what? Now I think about, if I am honest, the course I did at [name of the oil company] I don't remember too much. If anything in fact! This is probably due to the fact that the training staff were not the operational high performers type. A few tricks, but nothing bowl-you-over impressive*." [VL03-23]

This particular response directly suggests a need for real-world relevancy in order for learning to occur. It is a mediating causal factor. This factor would also appear to superordinate real-world linkages above creative training pedagogy. Indeed, creative training methods may even exist in the delivery, yet still be insufficient for development to occur:

> "*…granted they are great at training; they are often charismatic and articulate and can really get you caught up in the whole experience. But this cannot get you away from the obvious*

issue: their perspective is not familiar. It doesn't match the reality. For this reason there is always a distinct distance between the trainer and the participant." [VL02-011]

Thus the debility of trainers to impact on developing leaders was evidently down to absent credulous links to organisational realities, and despite even impressive training abilities of trainers, without such links to real-world context and to representative authority, of that real-world, leadership development is consequently inhibited in efficacy. This latter point about trainers being representative authorities of the organisation was linked to participant development accountability:

"*…the external trainers are there to impress and do their magic, but there is very little real-world accountability. I suppose this is not their fault at all, I appreciate that, but it doesn't help development. There is little care and consideration for impact I think without there being accountability*." [VL02-013]

"*I imagine the trainers are trying to convince us, but it doesn't land. Just isn't linked, no, little appreciation for reality*." [VL01-015]

Conversely, the focus group participants were very clear as to how this potential inhibitor does not apply to the military leadership development trainers:

"*The military has absolutely the polar opposite case. I cannot understate how different it is. The military puts its very best operators into the training world and uses them as role models and archetypes for the students. Like superheros*." [VL02-011]

The military leadership trainers had clear credulity, authority and linkages to real-world application. This is now discussed below in the potential catalyst *authority and connectivity*.

Catalysts – Delivery

4.11.1.2 Authority and connectivity

The analysis revealed a richly described polarised position regarding the authority and connectivity of trainers across the two sectors. As discussed above, energy trainers were not members of the organisation, and indeed often had no experience even of the sector, therefore struggled with credulity and real-world connectivity; whereas, the military trainers were all entirely internal members of the organisation, seconded from operational leadership roles, to the training environment. Unlike the energy trainers, this approach means that the military trainers have formalised superior authority over the participants.

A respondent outlined this polarised position:

> "*…I feel there's also an issue about external trainers being held unaccountable for leadership development, either by the individuals or the organisation. The linkage in the military is obvious: the trainers represent their capbadges and the wider army. Their performance as trainers is completely linked to their ability to do well, impacting on their own prospects when they return to the operating environment, and the ability of the students to do well after the course when they join the wider army. That link is not there in industry*." [VL02-013]

The formal authority which military trainers have over participants generates a specific motivation to be impactful on both the individual participants and the wider organisation. In this way there is a strong potential catalyst for systemic leadership development.

Furthermore, this authority is supported by explicitly superior talents, abilities and experiences of the trainers:

> *"The military puts its very best operators into the training world and uses them as role models and archetypes for the students. Like superheros."* [VL02-012]

The degree to which the military trainers are regarded as super-human cannot be underestimated here. All respondents were unequivocal regarding the formal and informal authority the trainers had over participants: they were quite literally "superheros".

Another aspect of authority which differs across the two sectors is the nature of scrutiny. In the energy sector, "*…the magnifying glass is over the trainer, not the student…*" [VL02-014], this results in a delivery tension among the trainers, where:

> "*…they are more scared about receiving the cross of death on the eval forms at the end of the programme. Because to be honest, that's about as much as the HR or training and development managers use to assess the impact of the training. Which strips it down basically to a popularity contest. Sad but true. This naturally leads to training sessions being entertaining but not really challenging. It's a bit like watching TV. It's about someone else. But it's fun to watch. Like that Big Brother programme. I imagine the trainers are trying to convince us, but it doesn't land. Just isn't linked, no, little appreciation for reality*." [VL01-015]

> "*…the industry participants on the training, show maybe a slight lack of respect for the trainers and training. Maybe a bit dismissive of them.*" [VL02-020]

This is utterly not the case in the military; indeed, there is a role reversal of the source of scrutiny: it comes from trainers, not participants, or some other department:

> "*With the military, yes the trainer's ability to train is rated, but the assessment is almost entirely orientated towards the student. They are under the spot light. The trainers are assessing the students continuously. They are both coach and judge*." [VL02-014]

In having scrutiny and assessment directed towards participants, not trainers, authority is taken away from them, and systemic needs are validated above local egoistic needs.

Another key element of this potential catalyst is the clear real-world connectivity demonstrated by the military trainers. Whereas, the energy programme participants "…*all see their worlds as being unique and different and special*" [VL03-019] therefore, "…*in a sense they are always going to expect that the training isn't really relevant, and that they might pick up a few incidental learnings, but in the main it's not really directed specifically for them*" [VL03-019], consequently "*most of corporate industry leadership development is done on the job*" [VL01-025] not on leadership development programmes. This is entirely not the case within the military delivery where connectivity is "*easy to identify: basic soldiering, uniforms, ranks, etc*". Military trainers recreate the real-world in every aspect of the learning and development, and immerse students in simulations and scenarios, where the students can learn directly from the experiences, coaching and mentoring of the leadership trainers. In the military programme, connectivity is daily and implicit in everything that is done, with the "superhero" trainers demonstrating by example how leadership should be applied within real-world contexts.

4.11.1.3 Systemic leadership development Summary

The analysis of *Element One: Delivery* demonstrated several important factors of influence for generating systemic leadership development.

Firstly, a *lack of credulity and realism* with regards to leadership trainers and their experience and understanding of the organisation's operational leadership needs, and their ability to represent realistically the operating environments, of the participants, in the learning experience, may negatively inhibit systemic leadership development. This lack of credulity and real-world linkages inhibits the trainers' essential systemic role as conduits of organisational development and promoters of integration with wider social structures. Fundamentally, there is a lack of social awareness manifest in leadership trainers who do not come from within the organisation conducting the leadership development. In short, this lack of social and organisational awareness restricts their ability to connect learning and development with the systemic realities of the working environment.

Secondly, there is a potential catalyst found in leadership trainers' who demonstrate and apply *authority and connectivity* in the programme. The analysis showed that the formal authority which military trainers have over participants generates greater accountability and motivation, where development is both impactful on individual participants, at the local capital level, and on the wider organisation, at the systemic social capital level. This is supported by scrutiny and assessment being directed at the participants, not the trainers, with authority for scrutiny and assessment being empowered to the trainers, who represent systemic organisational needs. This potential catalyst also revealed that leadership trainers who are perceived as "superheros" within the organisation are more likely to have an efficacious impact on the participants through role-modelling and demonstrating 'by example', real-time through simulations, of how leadership should be applied within real-world contexts.

4.11.2 Element Two: Contextualisation

The analysis of the Fi Model *Element Two: Contextualisation* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.19**.

The researcher identified a prominent factor of influence for efficacious contextualisation within leadership development, across the two sector examples, in the potential inhibitor: *real-world disconnect*. Interestingly, this factor of influence could equally have been articulated as a potential catalyst, if considered from the inverse position of the participants' responses, regarding real-world connectivity. However, the participants' observations were almost entirely made in the critical negative sense, therefore for the purposes of representing the source data in the analysis, the factor of influence will be discussed from an inhibitive factorial position.

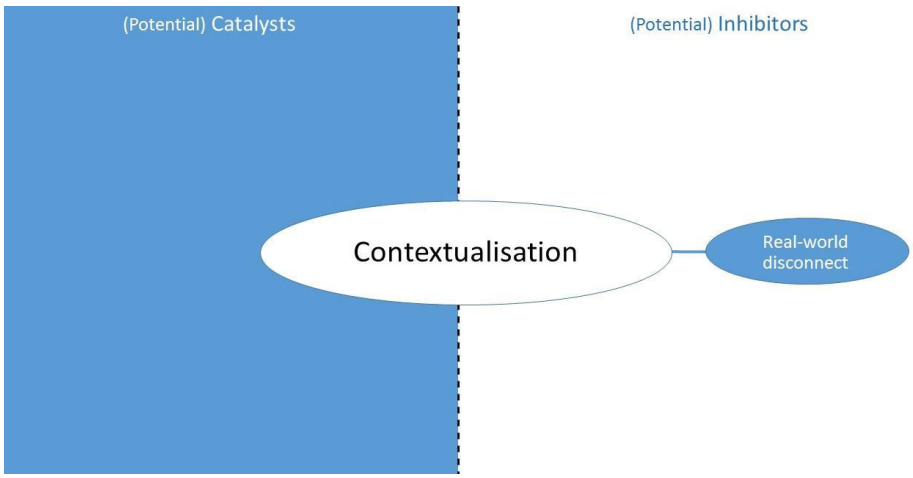

Figure 4.19 - Element Two: Contextualisation Fi Analysis. Source: Author

Inhibitor – Contextualisation

4.11.2.1 Real-world disconnect

The analysis of respondents' observations revealed a paradoxical challenge for integrating contextualisation into leadership development within energy sector organisations. All participants were undivided in acknowledging this particular paradox; with one participant explicating the issues profoundly:

> *"In the oil industry, there is also something about whether the leadership concepts in the leadership training actually conflicts with business demands. Making it irrelevant. This is linked to the points earlier about management wins in the corporate world, whereas leadership is more perhaps explicitly referenced and developed in the military. Doing leadership, being focused on the team and making people feel motivated and emotionally*

engaged, can actually take too much time. Time away from delivering on your boss' expectations. So actually, the thing you bin are the leadership theories, and you focus on just getting it done, by hook or crook. Just tell them what needs to be done. Get on with it." [VL02-027]

This remarkable insight reveals a profound contextualisation issue for energy companies: does leadership, and its concepts and approaches, actually 'fit in' the real world? Is there realistically a place for it? The same respondent continued his reflection:

"…in this sense, it's an add-on. It may well involve timeless lessons about how leaders interact with followers, and which behaviours work best, but really, in reality those things are nice-to-haves, but it's more about management in fact. It's more about targets and delivery. It's more about getting the projects passed off. It's about showing your boss you are competent and capable enough to hit targets. So anything that compromises this is counteractive, especially if it takes you attention and time away from managing performance. If you spend more time batting on about leadership and behaviours, rather than management and delivery, you will dig yourself a hole. So really you might argue applying this is career suicide." [VLO2-028-029]

These observations were expanded by another respondent, who then drew direct reference to the implications this has on real-world contextualisation:

"*But back to your question of real world context, for leadership issues, I suspect the context is not important, as actually those challenges are not openly shared. People don't want to admit that the experiences great challenges and issues with man management, and they certainly don't want to be sharing those challenges with colleagues, who are often perceived as being competition. So really, the context for leadership, with its inherent conflict with management, is impossible or, even the trainers or training managers, are unwilling to recreate it."* [VL01-032]

This shows a material challenge for leadership development: if leadership cannot be plausibly linked and applied to the real-world, it may in fact be practicably extraneous. Furthermore, recreating or reflecting contextual leadership challenges within the organisation become either, at most, impossible or, at least, self-contradictory.

The third participant continued to expand on the contextualisation paradox for the energy sector, by drawing out a potential inhibition with regards to the ability of the leadership trainers to provide real-world contextualisation:

> "*There is also the argument that they [oil company trainers] don't get context. They simply don't understand the man management challenges experienced by leaders in the organisation."* [VL03-033]

Indeed, it was acknowledged that although trainers made an attempt to link to context - via tools such as case studies - their ability to link them to future-tense real-world organisational leadership was seen as being entirely poor. The respondent continued to lament that there was:

> *"…nothing of how to then do it differently next time; how do you actually change to avoid these errors or challenges in the future? What role has leadership in reality in not repeating these cases? The oil company training utterly fails to make these linkages. Doesn't land at all. The nexus or roots are not bedded deep in business reality. It's not biologically linked to the business. Whereas, in the military that is precisely what all the exercises and command appointments are all about; changing leaders' behaviours to match how best it should be done in the future. Not settling for a classroom chat, but physically practicing leadership over and over, in the most appropriate context."* [VL03-033]

This potential inability to explore and integrate real-world application may generate a significant potential inhibition to achieving efficacious systemic leadership development. It may even actually limit leadership development to merely trait-based leadership theories, rather than effectively exploring situational- or contingency-based leadership theories. This potential limitation would subsequently inhibit entirely a SAEI perspective of leadership, which is firmly rooted in transformational theories. Indeed, without context, how might the leadership development create realistic social and environmental improvement linkages at all?

4.11.2.2 Systemic leadership development Summary

The analysis of *Element Two: Contextualisation* revealed a potentially significant inhibitive factor of influence in generating systemic leadership development.

There emerged a *real-world disconnect* between the realities and challenges of organisational contexts and the applied approach to leadership development within energy sector programmes. Both trainers and the content of the programme failed to generate real-world linkages, where leadership could not be plausibly linked and applied to contextual dynamics outside of the programme. This inability to explore and integrate real-world application may create a potential inhibition for systemic leadership development, as it potential excludes meaningful consideration for a SAEI perspective of leadership, which is orientated towards developing systemic needs across social and environmental considerations. Without dealing directly with contextual dynamics and challenges in the leadership

development, these two factors, social and environmental, are potentially disconnected from the learning experience. This is potentially hugely negative for systemic leadership development as it may inhibit leadership-congruent organisational development and effective social structures and processes. Indeed, left unchallenged within a contextualised leadership development experience, cultural and social awareness factors may retain their unhealthy disregard for the role of leadership in managers' and organisational performance.

4.11.3 Element Three: Performance

The analysis of the Fi Model *Element Three: Performance* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.20**.

The researcher sought to engage the focus group in a comparative discussion regarding their experiences of mid-level leadership programmes across the military and energy sectors, by asking them to extrapolate value judgements alongside their reflections on how performance feedback was given to participants during the either of their cross-sector leadership development programme experiences.

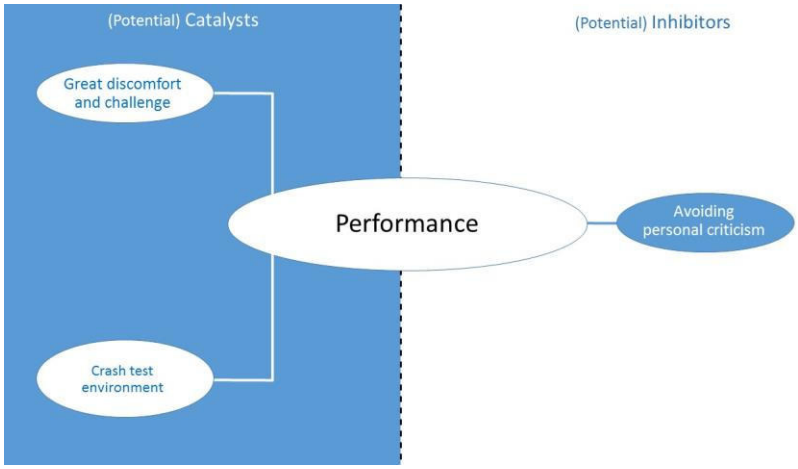

Figure 4.20 - Element Three: Performance Fi Analysis. Source: Author

Inhibitors – Performance

4.11.3.1 Avoiding personal criticism

The analysis revealed a significant potential inhibitor for energy leadership development, in the unanimously shared observation, that personal criticism of individuals' performance whilst on the programme is, in the main, avoided. This observation was in stark contrast to the daily performance scrutiny and critiquing on the military programme. As to how much feedback was given to individuals on the energy programme, one respondent observed that there was "*virtually nil in oil companies*" [VL03-0340], and that performance feedback is engaged only through formal internal 360 multi-ratings and behavioural guides as part of HR appraisal systems, extraneous to the programme.

The negative effect of avoiding open critique of personal performance was observed by another participant:

> "*…it's all a bit of a masquerade performance; just ensure that you keep your mask up, and if everyone else does the same we won't feel so bad. It's all very polite and civil. Then the*

leadership trainers think everyone is perfect, bright and rosey – like no one seems to be a basket case…" [VL02-037]

This commitment to avoid personal criticism produces clear examples of obvious inhibitions, as reflected in the participants responses, such as:

"*I'm sure this charade must generate trainer nervousness, thinking 'everything seems fine', so why are they experiencing so much hardship and challenges if leadership is so good. This whole pantomime is bad for the training. It's all delusional*." [VL02-037]

This rather 'three mystic apes' approach to performance review and appraisal, where both trainers and participants are unwilling to engage or recognise it, appears to result in a delusional agreement that "*everyone seems to be switched on and playing their 'A-Game'*" [VL02-037]. However the most damaging effect of this delusion is that "*attendees are then made to feel sun shines out of your ass. It's a vicious cycle of deceit*" [VL02-037]. Such deceit serves only to reinforce egoistic behaviour amongst participants, and furthermore, that they require no extrinsically-enforced personal adjustment of certain behaviours and interactions, in order that they are aligned and congruent with organisational needs and imperatives. Either to generate collective synergies or efficacious social structures and processes.

Catalysts – Performance

4.11.3.2 Great discomfort and challenge

Contrary to the energy programme experiences of the focus group participants, where all elements of the programme (design, management, training staff and participants) circumvents a serious, systematic attempt to critique individuals' performances; identify and correct performance short-comings; and challenge participants against prescriptive expectations, the military programme experiences were dialectically opposed.

One participant drew direct attention to this observation:

"*There seems to be so much less room for delusion in the military training because there is so much brutal scrutiny! Your entire character, good bits and warts, is on display for everyone to see. There is simply no place to hide. Those that try to hide, don't last."* [VL02-040]

In the military, prescriptive performance expectations are integrated into daily activity, from morning parades, dress codes, stretch assignments, language and form to punctuality and social graces. These expectations are intended to generate a basic level of standards and conduct, which are consistent

across the organisation. This uniformity allows a systemic development of social awareness and integration, where good or bad leadership is considerably easier to observe and critique; because what is regarded as good and bad is explicitly addressed and developed on the programme.

However, in order to develop leadership that is integrally aligned to the organisation's systemic needs, participants are put at great personal discomfort and rigorously challenged. This is not viewed by the participants as some archaic and sadistic ritual or passage of rites, but rather, necessary, in order to codify the qualities and expectations of good organisational leadership, and to ensure that all participants, regardless of prior inherent capabilities, display those attributes throughout the programme.

One participant recognised the need for discomfort and challenge:

> "*Yes, I agree, this is where the military differs, it doesn't assume that everyone is perfect and automatically giving their 'A-Game'. It checks it. Tests it. Provides an archetype that leaders must live up to. Change or die."* [VL03-041]

This strongly worded 'change or die' reference indicates the strength of sentiment regarding the degree to which individuals' performances are scrutinised and challenged on the programme. It is a universally deeply uncomfortable experience.

Military programme participants have their performances challenged through continuous observation and feedback. The observations are facilitated by daily interaction with the leadership trainers and through simulations and exercises; and the feedback is issued both informally and formally, but always against standards and expectations of the organisation. This observation-feedback loop creates a hugely challenging learning environment:

> "*This commitment to set a standard and check it is hugely confrontational and challenging, but it's good for you, that is without doubt*." [VL03-041]

It is 'good' for participants because it provides unequivocal guidance with regards to organisational expectations for their personal growth and progression, and outright success; i.e. *this course will make you different and in 'this' way; now we 'will' facilitate the change*. This commitment to robustly challenge participants' performance continuously, and often in a discomforting fashion, represents a systemic commitment to uncompromisingly exalt organisational needs above egoistic needs.

4.11.3.3 Crash test environment

Coupled with the discomfort and challenging feedback, there was a recognition that the learning environment was inherently safe, and that military programme participants could try and fail repeatedly until they got it right. In this sense, the programme was like a *crash test environment*; by its very design intended to test performance in the most robust and challenging manner possible.

A focus group respondent reflected on the efficacy of this crash test environment:

> "*Because it has been tried and tested in the past. Everyone ahead of you has already been through it. It works. Also, it is a safe environment. Things you got right and wrong never go beyond the gatehouse*." [VL03-042]

Military programme participants could trust that their performances being 'crash-tested' would be done so in relation to not just the expectations of the current programme, but also to all the antecedent programmes, where prior leaders endured the same testing and progressed upwards within the army. This idea of an inherited experience, beyond just the current programme, was reflected on in the focus group:

> "*You are just a sausage in the factory so to speak. Not in a derogatory way, rather in a process way, like a recipe for success. This recipe leads to good leadership. It allows particular development, where quality rose up, and then allows it to shine even brighter."* [VL03-042]

This crash test environment factor of influence allows participants to safely engage with the most challenging aspects of the programme, with regards to their personal performance, and also to recognise the systemic nature of the experience, which has been successful endured by countless other organisational leaders, further up the promotion ladder. This continuity across the long term and integration with social structures potentially provides an important catalyst for systemic leadership development.

Furthermore, the challenging nature of the crash test environment appeared to have a long term effect on individual participants, beyond the tenure of the programme, which challenges their entire lifestream model (Avolio, 2005). This was summed up perfectly by one focus group participants:

> "*This sort of training lasts forever. It shakes everything about you. My whole view on life changed. It gave me a recipe for success within the British Army; if I act like that, I will win. I will be a good leader. This made me look at everything differently, like a new lens*." [VL03-045]

4.11.3.4 Systemic leadership development Summary

The analysis of *Element Three: Performance* uncovered several potential factors of influence in generating systemic leadership development.

Firstly, *avoiding personal criticism* of individuals' performance on the programme, potentially reinforces egoistic behaviour, and fails to enforce an extrinsic set of organisational performance expectations, of certain behaviours and interactions, on programme participants. This may inhibit organisational development needs, such as social and organisational imperatives. It may also inhibit the systemic development of collective synergies, through insufficiently defined expectations around trust, cooperation, goodwill and reciprocity. Equally, without clarity regarding what constitutes efficacious social structures and processes, and how leadership practicably maintains them, there is a potential risk of failing to generate key elements of systemic leadership development.

Secondly, the potential catalyst of *great discomfort and challenge* reveals how a systemic commitment to robustly challenging participants' performance, even in a discomforting manner, by continuous observation and feedback, and enforcing the development of desirable leadership behaviours and skills, may lead to systemic leadership development, as organisational needs are demonstrably elevated above egoistic needs. This potentially supports unambiguous and collectively-aligned social awareness, i.e unconducive leadership behaviours are harder to hide and excuse, across all aspects of systemic leadership development.

Thirdly, the *crash test environment* factor of influence potentially generates systemic leadership development, as participants feel safe in the learning environment; to adapt and change their own leadership style and behaviours without fear of fellow-participant, as well as wider organisational, scrutiny or criticism. Also, the 'crash test' process of challenging and testing personal performance, is systemically linked and validated by the success and application of other leaders back in the operational environment, who have previously gone through the process. Therefore, the broader and long-term application of the products of the performance review and appraisal (leader development), are clearly demonstrable to the programme participants, and provide a valuable social awareness across all aspects of the systemic leadership development definition.

4.11.4 Element Four: Impact

The analysis of the Fi Model *Element Four: Impact* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.21**.

The researcher sought to engage the focus group in discussion comparing their experiences of mid-level leadership programmes across the military and energy sectors, by asking them to extrapolate value judgements alongside their reflections on what impact the leadership development programmes, within each of the respective sectors, had on individual and organisational development.

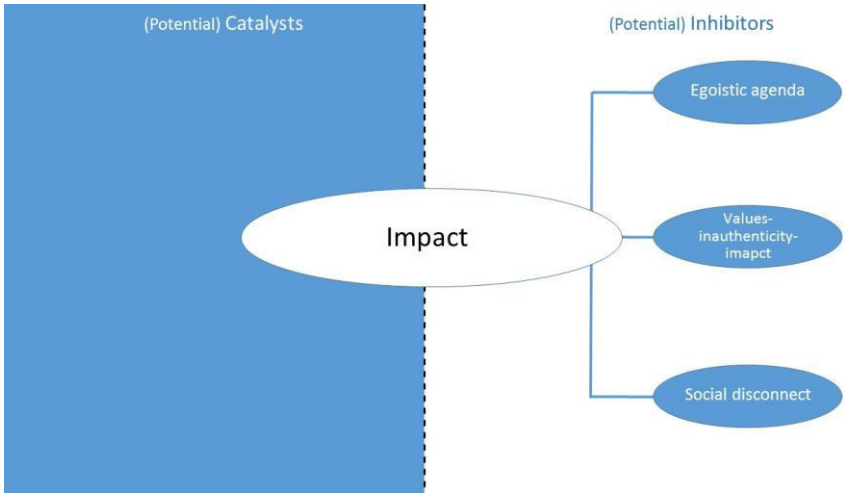

Figure 4.21 - Element Four: Impact Fi Analysis. Source: Author

Inhibitors – Impact

4.11.4.1 Egoistic agenda

The experiential observations, of the energy programmes, expressed by the focus group participants coalesced with regards to a potential inhibition for systemic leadership development: the existence of a predominantly *egoistic agenda*. It was evident from their responses that the purposive motivation behind conducting the programme was personal career development, rather than a desire to align with wider social or organisational imperatives. Thus, individuals' experiences of the programme were often more isolated and individualised, indeed, where:

> "*…the emphasis is less on group think, rather it's all about the individual, not the team. Very little effort is made to address how a cohort going through leadership training together will develop or how they will interact again subsequent to the training*." [VL01-048]

This revealed a potential issue for systemic leadership development, as the learnings of the programme are not directed towards social development, but focus rather on participants' acquiring

maximum individualised learning from their experiences. This egoistic approach, advances isolationism with regards to learning, as recognised by one of the focus group responses:

> "*So it feels a bit like doing a part-time Masters degree; it's a lonesome journey. So really it's a PDP exercise. For personal gratification. It's there to make you better, more employable, have a better CV*." [VL01-050]

This personal gratification factor may, in fact, lead entirely the wrong direction for the organisation, as participants generate their own egoistic expectations of future promotion and subsequent leadership roles, which is unmatched by the organisation. Essentially, there emerges a divergence between the individual's agenda and that of the organisation. This divergence or conflict may then result in the participant becoming disillusioned with where they fit in, as the organisation finds itself unable to control or satisfy each individual participants' idiosyncratic expectations.

One focus group participant revealed this point explicitly:

> "*Problem with that is the realities back in the day-job don't quite match these ambitious promises; so often it merely wets the appetite for something different. I am quite sure they do not intend this, but that is what happens, frequently. So people leave, as the loyalty and reciprocity is not there*." [VL01-051]

This 'egoistic agenda' factor of influence motivates individual participants to create their own expectations as to which learnings are most pertinent, in relation to personal gratification and advancement, and which to resist. This demonstrates a considerable potential inhibitor for systemic leadership development, as it relegates core elements, like collective synergies, organisational development and the creation of efficacious social structures to subordinate levels of importance. In this situation, all aspects of the systemic leadership development definition potentially suffer, as local capital needs outweigh social capital needs, to the detriment of nurturing SAEI perspective leadership.

4.11.4.2 Social disconnect

The analysis also revealed a potential inhibitive factor of influence, across all three of the focus group participants' experiences of energy programmes; in that, a clear *social disconnect* potentially exists between the learning content and environment, and the social environment beyond the programme (i.e. back in organisational life). In a way, the energy programmes created an egoistic preserve away from the realities of social organisational leadership, which made connectivity between learning and praxis extremely problematic.

One participant outlined this problematic connectivity issue:

> "*It* (the programme) *was not linked to anything back in the business, either training or career development. It seemed to be quite discrete too, little broader awareness, making one feel like this development was being done in isolation, with little coordination with other training. What I mean is hard to explain, but there was just no 'greater scheme of things' feeling with it*." [VL02-047]

This quotation brings to light another key issue for the social disconnect factor, that is, understanding what good leadership in the social environment looks like; and subsequently reinforcing that with sufficient quality and quantities of learning and development to have an impact on the developing leaders. This reinforcement issue was lamented by another focus group participant:

> "*It is also fair to say, compared to the military, and it is pretty crystal clear, that there is simply not enough leadership training in [name of oil company]. Any leadership development that does occur is purely by sheer luck and circumstance, and utterly subjective in whether one way is better than another. Most people therefore do not rely on training to develop as leaders, in fact they vaguely think about the issue, if ever, because in the business they are lucky to get any, and when they do it's often quickly seen as a distraction from day to day delivery and operational demands*." [VL03-052]

It is clear from these observations that the relationship between leadership and social interactions - and which specific learning and development approaches foster richer and more effective social interactions within the respective organisations - is not meaningfully explored at all within the programmes; and perhaps even worse, is actually neglected from the developmental experience. This disconnect between an essential aspect of leadership – social interaction – potentially inhibits any systemic leadership development; as without serious consideration for how leadership development relates to social interaction and development, the programme will have little impact beyond mere leader development.

Subsequently, with regards to identifiable efficacious impact on organisation development, as a direct result of the energy programmes, the focus group showed complete unanimity:

> "*But to bluntly answer your question about impact: really, in [oil] business these programmes have virtually zero impact on the organisation*." [VL01-53]

4.11.4.3 Values-inauthenticity-impact

Analysis of the focus group discussion revealed a possible complex causal relationship between organisational values; the degree to which they are authentically upheld; and the impact they have on the organisation. A key stage in this potential causal chain hinges on whether a participant experiences values-based leadership which contradicts their own value system. This particular observation was consistent across both military and energy experiences, as clearly expressed in one response:

> "*…this is not just an oil company issue, the army gets this too, when the organisation appears to contradict its own values, especially around career progression and appointments*" [VL01-0510]

The most significant effect of this potential inhibitor is a negative impact on retention.

When leaders experience an inauthentic demonstration, by organisational leaders, with regards to upholding corporate values, or they outright conflict with their own values, this results in developing leaders feeling incompatible with the organisation, and they often leave. All three focus group participants acknowledged this was a significant problem in their experiences across both the military and energy sector. In the specific case of leadership development programmes, this phenomena is manifest in the commitments and promises, made by the organisation, for extraordinary career progression and subsequent leadership appointments. When organisations do not live up to these commitments, or the expectations thereof, the developing leaders distrust the organisation, leave during the programme, or shortly thereafter; resulting in a material loss to systemic leadership development.

One participant outlined the potential inhibition for systemic leadership development:

> "*…sometimes the needs of the army coming first, and in doing so they actually exploit individuals, by forgetting their needs altogether, this can lead to a conflict in organisational values versus personal values. Resulting in people leaving. This really raises the point about organisational values being directly linked to impact of value-based leadership training. If the organisation doesn't connect with the heart, and live up to its big promises, of exemplary values and standards, then the impact is lost*." [VL01-0510]

This potential inhibitor has significant impacts on systemic leadership development, as it negatively effects essential elements of generating collective synergies, such as forging and maintaining commitments and sustaining trust, cooperation, goodwill and reciprocity. It also undermines the social

imperatives of organisational development; where hearts as well as minds are what advances organisational development.

An analysis of the specific issues regarding inauthenticity in corporate values is discussed in greater detail in the next Element (five) below, under the potential inhibitor: *inauthenticity*.

4.11.4.4 Systemic leadership development Summary

The analysis of *Element Four: Impact* revealed three potential inhibitive factors of influence in generating systemic leadership development.

Firstly, the *egoistic agenda* factor of influence revealed that within energy programmes the purposive motivation for participants engaging with the development was personal career development, rather than aligning with wider social or organisational imperatives. This allowed local capital needs to outweigh social capital needs, to the detriment of nurturing SAEI perspective leadership and systemic leadership development. Furthermore, participants generated their own expectations as to which learnings were most pertinent, in relation to personal gratification and advancement, and which extrinsic, and often uncomfortable, learnings to resist. This demonstrates a considerable potential inhibitor for systemic leadership development, as it relegates core elements, like collective synergies, organisational development and the creation of efficacious social structures to contingent subordinate levels of importance.

Secondly, the potential inhibitor, *social disconnect,* revealed that failing to situate and integrate leadership development with wider organisational social contexts, and prescriptively target the development of efficacious social interactions, as part of programme learning objectives, the developmental intervention may have little impact beyond mere leader development. A key element of systemic leadership development is to incorporate a collective and relational orientation, with the idea of contributing to long term organisational impact: this potential inhibitor impedes this important systemic view.

Lastly, the *values-inauthenticity-impact* factor presented major challenges for systemic leadership development, as inauthenticity with regards to demonstrating corporate values, conflicts with participants' own value systems, and potentially leads to adverse feelings of incompatibility, and subsequent disengagement with, and even departure from, the organisation. This potential inhibitor negatively effects essential elements of systemic leadership development, such as socially forging and maintaining commitments and sustaining trust, cooperation, goodwill and reciprocity; as well as disregarding the social imperatives of organisational development.

4.11.5 Element Five: Values Integration

The analysis of the Fi Model *Element Five: Values Integration* generated some important potential inhibitors and catalysts. These are demonstrated below in **Figure 4.22**.

As with the previous four elements, the researcher sought to engage the focus group discussion in comparing their experiences of mid-level leadership programmes across the military and energy sectors, by asking them to extrapolate value judgements alongside their reflections on how corporate values were integrated into the leadership development programmes, within each of the respective sectors.

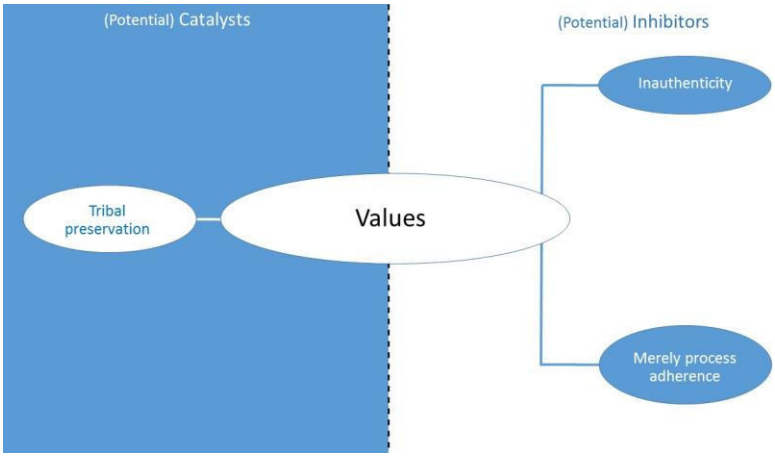

Figure 4.22 - Element Five: Values Fi Analysis. Source: Author

Inhibitors – Values

4.11.5.1 Inauthenticity

Inauthenticity was revealed to provide a potential inhibition for generating positive developmental impact on the participants. The inauthenticity relates to whether participants recognise that senior leaders lack buy-into the corporate values and whether they are mostly a public relations tool for reassuring shareholders that risk management and mitigation is a priority; thus, assuring corporate structural integrity and market value.

The focus group participants identified an important difference between the military and energy sectors, as to the degree to which organisational values were authentically endorsed and articulated: the military being consistently obsessive about their genuineness; energy, customarily neglective. This reveals a paradoxical issue for the energy sector, which believes that it strongly endorses corporate values and broadcasts them widely on marketing materials. However, the analysis revealed that merely presenting the values on marketing materials for employees to refer to, and wishfully apply,

lacks the sort of emphasis and importance required to make values a material part of organisational leadership.

This paradoxical issue was elucidated in one response:

> "*Values and standards are central to both; but are much more rarely articulated in the business world. More often than not they are used as a PR exercise for customers*." [VL01-054]

The inauthenticity of corporate values, in this sense, makes them an abstract, or disconnected, schema for leadership development programme participants. They have no tangible applicability within organisational leadership, other than for executive leadership narratives to external partners and markets; but these appear meaningless internally. This point was clearly revealed in one response:

> "*…in business, the values are corporate wallpaper, covering the corridors like some disingenuous plea, or liability protection. They only have meaning when board directors are at their last resort. Those values are meant for shareholders to assure them laws won't be broken. I have seen all sorts of behaviour in here [oil company] that makes a joke of our values, which incidentally are mostly all performance related, so less about behaviours and more about delivery outputs. If there wasn't such an extreme of scrutiny from government and legal bodies you wonder what people would get up to in this place to 'win'*." [VL02-0550]

This issue of inauthenticity around corporate values reveals a potential inhibitor for systemic leadership development, as the values – which are essential components for framing leadership interactions - lack realistic linkages with social interactions and social capital development within the organisation. They are abstract notions for external public and market relations.

4.11.5.2 Merely process adherence

The analysis revealed a potential inhibitor in the approach that corporate values can be enforced by *merely process adherence*: and that directive rules and procedures are sufficient. The analysis revealed that, within the energy sector, the most significant corporate value - safety - suffers from a one-dimensional intuitive appreciation: leaders see 'safety' as a process enforcement action; therefore a management issue.

This point was clearly articulated by one of the focus group participants:

> "*The only element I suppose that is scrutinised, in the oil industry, to a degree, a certain degree, is safety. In this sense, safety is the only leadership value or significance. But it must*

be stated, that in oil companies, safety is mostly seen as an operational process thing, not really behavioural. It's about following procedures and protocols; it's a law enforcement issue. Know the process for a given thing, stick to it unwaveringly, actually with often little regard for cause and effect, and you will be successful." [VL02-005-006]

This process approach promotes that safety issues and behaviours can be explicated and proceduralized, "…*from reverse parking and lids on cups*…" [VL01-056], and where leaders over-simply this interaction to devising processes and dictating them, rather than by promoting values by idealised influence (Bass, 1985), efficacious social interactions and SAEI orientated leadership.

This observation was highlighted by another focus group participant:

"…*the problem is how safety is promoted internally; it's a process issue. Guidance is given, rules are set in stone, people follow those or they are punished. It doesn't engage with emotional understanding of why safety is important. The collective maintenance needs*." [VL01-0560]

This reveals an adverse effect of the potential inhibitor for systemic leadership development: a neglect of collective maintenance needs. This may inhibit key systemic elements like the development of collective synergies and social awareness.

It was recognised that the enforcement of values was not the issue, indeed rules and discipline are key components of enforcing values-based leadership behaviours; however, the issue was found in the approach that values were merely rooted in process, rather than in leadership interactions; that they connect rationally, rather than they connect viscerally. This *merely process adherence* approach to enforcing values-based leadership suffers from an inability to connect with hearts as well as minds; a management solution to a leadership challenge.

Conversely, the military programme was observed to view this issue from a moral and ethical perspective, and that leaders were encouraged, and developed, to intuitively appreciate this:

"*I'd probably add that I see there being a difference between values in the military and oil industry, because in the military they are seen as moral issues, doing what is right despite what happens and the cost involved, but in this [oil] industry values are ethics and they are basically legal issues, at the base. Morality is never discussed*." [VL03-059]

Essentially, this potential inhibitor restricts systemic leadership development, as it views organisational values principally as a process management issue, rather than a visceral SAEI leadership issue, where

leaders utilise positive social interactions and moral-based idealised influence, to promote values-based leadership.

Catalysts – Values

4.11.5.3 Tribal preservation

The analysis revealed a potential catalytic factor for integrating organisational values into systemic leadership development, through *tribal preservation*. This factor appears to identify that values can be efficaciously developed through a cooperative commitment to preserve the tribal entity. The factor was recognised in the focus group discussion, and clearly introduced by one of the participants' reflections:

> "*…the 'I am my brother's keeper' notion is a fundamental principle in the military leadership programme. From day one of the programme it's all about the team, the tribe. You very quickly realise that values are essential for maintaining oneness. Without one team, collective values are not relevant*." [VL02-058]

The correlation with team synergy and organisational values is deeply embedded in the military leadership development approach. This tribal view, which reiteratively speaking, is the social identity of the cohort, has leadership as a collective and relationally situated phenomena; with leadership development played out in a social forum, using organisational values as the code of conduct or criterion of behavioural scrutiny. This point was further expounded by a participant:

> "*The military nails the social nature of values. This is probably due to the public discussion and scrutiny that accompanies them*." [VL02-058]

Furthermore, values are seen primarily as being an explicit code of conduct for the preservation of both tribal members and the tribal system. This locates values within a socially constructed and SAEI orientated view of leadership, where social preservation and development is essential for long term maintenance. This long term, collective and relational positioning reveals a strong link between the potential catalyst and systemic leadership development. One participant observed this social preservation objective, within the context of values integration:

> "*The most common answer you hear from soldiers on operations in Iraq or Afghanistan, when asked about what motivates them through the challenging times, what do they value most, the answer is 'looking after each other'. Protecting their fellow soldiers. Ask the commanders the same question and you'll get the same answer. It never has anything to do with macro geopolitical issues. It's quite tribal. Primal social."* [VL02-058]

This social, tribal identity is potentially a powerful vehicle for contextualising values, with the catalytic factor preserving the social integrity of the tribe. Within this view, a key element of leadership, and indeed followership, is knowing your place within the systemic whole; what is your role in the tribe and what cultural, behaviour norms are necessary for long term preservation? An important implication for leadership development programmes is that the tribal identity and these value-based norms, which facilitate its preservation, must be clearly identified, communicated and re-enforced within the programme pedagogy. Within the military, as recognised by the focus group participants, this was done extremely efficaciously.

4.11.5.4 Systemic Leadership Development Summary

The analysis of *Element Five: Values* integration revealed several potential factors of influence in generating systemic leadership development.

Firstly, the *inauthenticity* factor of influence showed a potential inhibitor for systemic leadership development, when organisational values lacked authentic linkages with real-world collective relational interactions and social capital development within the organisation. Rather than being a bedrock of developing efficacious multilateral SAEI leadership, corporate values are viewed as abstract notions; more appropriate for external communications to the public and markets. Values are thus not reconciled with real-world organisational leadership interactions; and importantly, are not generating collective synergies and cultural development that exemplifies personified corporate values. This potentially leads to organisational values being tangential on the leadership development programme.

Secondly, a potential inhibitor - *merely process adherence* - presented a considerable leadership challenge, as enforcing values via a process management approach has the potential to neglect systemic leadership development needs. By reducing to merely enforced processes and procedures, the adherence to certain organisational values, such as safety, key systemic elements like collective synergies, social awareness and social organisational imperatives are likely under-developed; as management techniques appropriate the enforcement of values, rather than effective transformational leadership approaches. For example, this potential inhibitor circumvents, or at least treats lightly, key social organisational leadership considerations, like morally-based idealised influence and SAEI orientated leadership practice.

Thirdly, the *tribal preservation* potential catalyst revealed that when values are utilised as a means of preservation of both tribal members and the tribal system, they are socially constructed and SAEI orientated. This supports social capital preservation and development and is important for long term alignments as they are systemically embedded in social awareness and organisational culture. This

socially constructed, long term, collective and relational orientation reveals a strong potential link between the catalyst and systemic leadership development; manifesting as a socially embedded honour-bound code of conduct.

4.12 Validation Study - Inferential linkages to systemic leadership development

4.12.1 Extrapolating potential systemic leadership development linkages

As with the previous two case studies, the data analysis demonstrated a number of potential linkages between the data and systemic leadership development. Similarly with the previous cases, the researcher recurrently reviewed audio files and written transcripts, and triangulated with wider observations, identifying potential influential linkages with the systemic definition.

Table 4.5 below demonstrates the volume of potential linkages, between the observations of the focus group participants and the differentiated elements of the systemic leadership development definition. Identifying these potential linkages generated a degree of awareness within the researcher as to significant areas of interest for subsequent deeper factors of influence analysis.

	Potential linkages: systemic leadership development												
	Collective synergies					Organisational development				Social structures and processes			
Focus Group Source data	Team building	Forging and maintaining commitments	Trust, cooperation, goodwill and reciprocity	Feedback and challenge	Social awareness	Setting direction and alignment	Social and organisational imperatives	Cultural development	Social awareness	Integration with social and network systems	Fostering cooperation, coordination and networks	Social awareness	TOTAL
Participant 1	02	11	02	07	04	10	13	08	06	05	02	04	74
Participant 2	04	07	12	06	09	08	07	12	08	03	06	03	85
Participant 3	06	16	14	12	15	11	15	16	13	06	08	05	137
TOTAL	12	34	28	25	28	29	35	36	27	14	16	12	296

Table 4.5 - Potential Linkages: Systemic Leadership Development. Source: Author

The volume of potential linkages does not indicate whether the comments were positive or negative regarding efficacy, nor whether the respondent explicitly identified factors of influence; rather indicates possible inferential linkages to the systemic leadership development definition, as identified by the researcher when analysing the data. Analysis of whether certain potential linkages had a positive or negative influence on systemic leadership development were analysed in detail in the case study analysis within this chapter.

Five particularly rich areas of interest for the researcher were:

- Forging and maintaining commitments
- Trust, cooperation, goodwill and reciprocity
- Social and organisational imperatives
- Cultural development

- Social awareness of organisational development

These were of particular interest as the analysis revealed consistently rich insights as to potential factors of influence. These potential factors have been discussed in detail throughout this chapter, within each of the systemic leadership development observations sections. Furthermore, the significance of these particular aspects is discussed more in Chapter * cross-case analysis and research discussion.

Indeed, the *Fi* analysis within this chapter delved into these potential linkages in detail, and identified some possible reasons for the volume of references in the transcript data, and what influential factors might be drawn from the analysis. These are highlighted now in the summary.

4.12.2 Summary of Validation Study: Fi analysis

In summary, the within-case factors of influence analysis identified nineteen factors of influence across the five elements. The factors of influence are demonstrated in **Figure 4.23**.

These cover a broad range of systemic factors of influence and demonstrate potential inferential inductive links between cardinal themes of leadership development efficacy and the pragmatic realities of the case study. They showed that fundamental issues have the potential for significant impact. These factors provide a valuable picture and awareness for the subsequent cross-case analysis and research discussion.

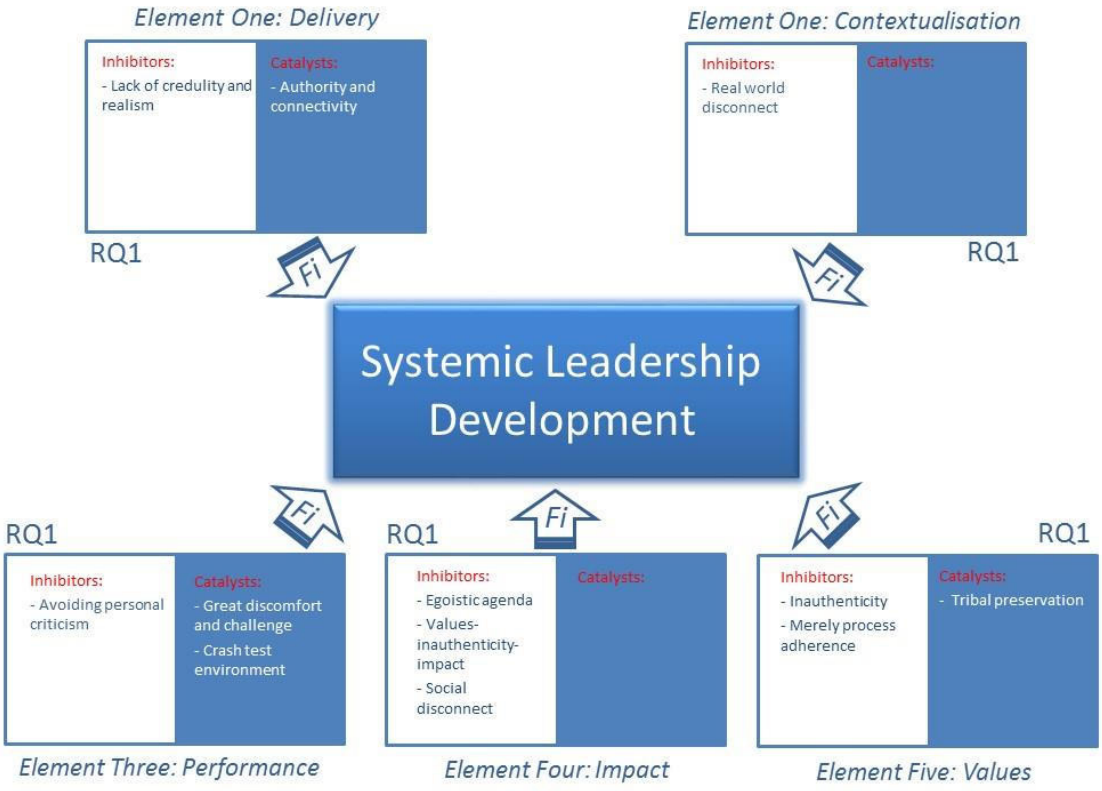

Figure 4.23 – Validation: Systemic Leadership Development Fi Model. Source: Author

The potential factors demonstrated above in the Fi model revealed both positive and negative influential factors for systemic leadership development. The respective linkages to which aspects of systemic leadership development they potentially affect is demonstrated in **Table 4.6**.

Table 4.6 is an analytical product of the discussion and summaries of each element section in this chapter. This table clearly shows a potentially significant array of influencing factors for generating systemic leadership development.

The final part of this chapter will now feature the cross-case discussion and research discussion, leading on to recommendations.

Element	*Fi* Inhibitors	*Fi* Catalysts	Influenced aspect of systemic leadership development											
			Collective synergies					Organisational development				Social structures and processes		
			Team building	Forging and maintaining commitments	Trust, cooperation, goodwill and reciprocity	Feedback and challenge	Social awareness	Setting direction and alignment	Social and organisational imperatives	Cultural development	Social awareness	Integration with social and network systems	Fostering cooperation, coordination and networks	Social awareness
Delivery	Lack of credulity and realism		X	X	X	X	X	X	X	X	X	X	X	X
		Authority and connectivity	X			X	X	X	X		X	X	X	X
Contextualisation	Real world disconnect		X	X			X	X	X	X	X	X	X	X
Performance	Avoiding personal criticism		X	X	X	X	X	X	X	X	X		X	X
		Great discomfort and challenge	X	X	X	X	X	X	X		X	X	X	X
		Crash test environment		X	X	X	X			X	X			X
Impact	Egoistic agenda		X	X	X	X	X	X	X	X	X	X	X	X
	Values-inauthenticity-impact		X	X	X	X	X	X	X	X	X	X	X	X
	Social disconnect		X	X	X	X	X	X	X	X	X	X	X	X
Values	Inauthenticity		X	X	X	X	X	X	X	X	X	X	X	X
	Merely process adherence			X			X		X	X	X		X	X
		Tribal preservation	X	X	X	X	X	X	X	X	X	X	X	X

Table 4.6 - Validation Study - Systemic Leadership Development-Fi Analysis: Aspect Linkages. Source: Author

PART FOUR: CROSS-CASE ANALYSIS AND RESEARCH DISCUSSION

4.13 Introduction to Cross-Case Analysis and Research Discussion

Part Four of this chapter addresses the findings of the cross-case analysis of Case Studies A and B, and the Validation Study, extending the validity of the constructs and revealing greater insights into the factors of influence for systemic leadership development, by conducting comparative analysis of the findings from each of the previous Parts of the chapter. This comparative analysis addresses Research Question Two:

> RQ2. *What recommendations and theoretical solutions have emerged from the findings with regards to generating efficacious systemic leadership development?*

The cross-case analysis findings and discussion are presented according to the thematic elements of analysis and their factors of influence. Each element, in turn, will discuss the overall findings, the similarities and dissimilarities extant across the cases, why these may be present, and what they disclose about efficacious systemic leadership development. This is carried out in order to extrapolate potential theoretical solutions from the discussion, and answer directly Research Question Two (as well as address the Research Aim).

4.14 Cross-Case Analysis and Research Discussion

The multi-case approach of this study utilised replication logic (Yin, 2003); where logical inferences are theoretical, not literal, and where the cases are anticipated to provide contrasting results, each for predictable reasons. The within-case analysis treated each case as an isolated investigation, with each case study affirming or confuting conclusions from the other ones (Yin, 2003). Furthermore, contrasting results in the cases potentially provides firmer grounding for propositions than is offered by constant elements merely observed in homogeneous groupings (Harris and Sutton, 1986). The multi-case approach also allows the development of more reliable models (Bourgeois and Eisenhardt, 1988), more compelling findings and greater reliability of results (Yin, 2003).

Importantly, construct validity is supported by identifying and explicating reasoning for the similarities and dissimilarities across the case studies (Eisenhardt, 1989); this then generates high construct validity, which is essential for internal and external validity (Modell, 2009).

The *raison d'etre* for the cross-case analysis is to identify these similarities and differences across the cases and to consider why they exist, and what implications there are for systemic leadership development. The within-case analysis has identified that the cases are comparable on the grounds that leadership development processes are doctrinally similar, if not pragmatically.

The analysis was congruent with applying a constructivist paradigm, by situating the within-case analysis within unique situated contexts, yet extracting common themes and patterns across both case studies and the validation study, to provide further insights on the nature of the underlying phenomena (Modell, 2009). The validation study was important in that it converged socially constructed experiences of both sectors into unified accounts, where they would support explication of comparative factors.

Based on the Factors of Influence (Fi) analytical model and the cardinal themes for analysis, a detailed analysis of the whole phenomena was undertaken.

As outlined in Chapter Three, the Fi model identified inferential causality within the core phenomenological interaction of the study: i.e. the way the five thematic elements impact upon the systemic leadership development concept. The Fi model captured multimodal facets of leadership development interventions, such as corporate values, strategy and operational realities; where perceived reality is socially and contextually constructed within a multifarious environment (Fairhurst & Grant, 2010). The analysis was praxis-orientated, meaning theoretical observations went beyond academia, into practice, where they must be interesting and relevant for organisational life (Alvesson, 2013).

The cross-case analysis generated a large body of evidence for:

- 61 factors of influence:
    - 28 potential catalysts
    - 33 potential inhibitors

How these sixty one factors were distributed across the five elemental themes is demonstrated below in **Figure 4.24**. Across the sixty one factors, there were significant thematic consistencies, as well as certain paradoxes and fundamental differences. However, in the cases of differences, the dialectical arguments unveiled considerable insights, as is discussed below in this chapter. Indeed, the differences were frequently merely polarised discussions regarding the same target phenomena; from effective and ineffective perspectives, respectively. Where a factor was identified as inhibitive, it was identified as being an ineffective application of the phenomena; whereas the catalytic discussion was consistent with an effective application of the phenomena - despite both perspectives addressing the same phenomena. This only became apparent through cross-case analysis.

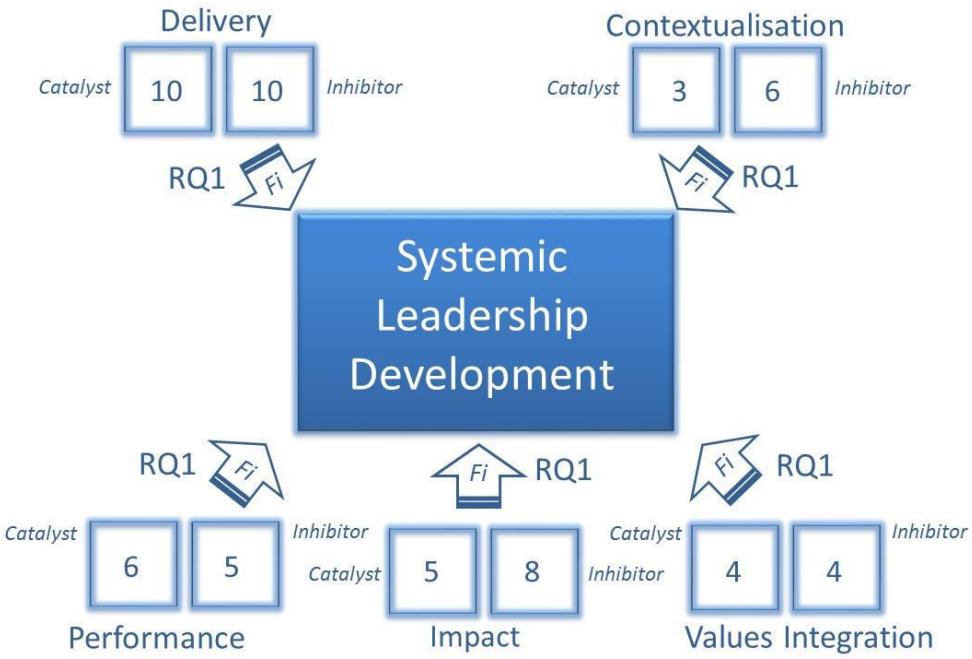

Figure 4.24 - Total Distribution of Factors of Influence. Source: Author

Beyond the five core elemental themes of the study, an analysis of organisational leadership revealed fifteen additional factors of influence: eight potential catalysts and seven potential inhibitors. These factors shed considerable light on contextual-environmental factors, within which the respective sectoral leadership development interventions were situated, and were important in explaining dialectical positions across the case studies and validation study.

As stated, the crucial part of the cross-case analysis was investigating the way in which the five thematic elements impacted upon the systemic leadership development concept, in order that the researcher might generate theories and recommendations for subsequent efficacious systemic leadership development. The potential volume of inferential linkages in the data was significant, as is demonstrated in **Table 4.7**. These represent total potential linkages, as identified by the researcher. Consequently, the deep and rich data provided a significant corps of evidence for discussion and theoretical development. It should be noted that Case B had considerably more extant potential linkages than Case A. This was also reflected in the greater number of potential catalysts for systemic leadership development identified in Case B compared to Case A.

Potential Linkages: Systemic Leadership Development													
Cross-Case Analysis	Collective synergies					Organisational development				Social structures and processes			TOTAL
	Team building	Forging and maintaining commitments	Trust, cooperation, goodwill and reciprocity	Feedback and challenge	Social awareness	Setting direction and alignment	Social and organisational imperatives	Cultural development	Social awareness	Integration with social and network systems	Fostering cooperation, coordination and networks	Social awareness	
CASE STUDY A	41	136	150	198	94	227	182	137	163	156	105	148	1737
CASE STUDY B	214	302	275	253	233	221	257	183	214	221	214	238	2825
VALIDATION STUDY	12	34	28	25	28	29	35	36	27	14	16	12	296
TOTAL	267	472	453	476	355	477	474	356	404	391	335	398	4858

Table 4.7 - Cross-Case Fi Systemic Leadership Development Linkages. Source: Author

Given the mainstay of the following cross-case analysis was the comparative examination of key deductions from the factors of influence analysis and extrapolating key recommendations for systemic leadership development, the cross-case analysis and research discussion will now present those extrapolations and recommendations, firstly considering situational organisational leadership factors, then structuring the discussion around the five elemental themes.

4.14.1 Organisational Leadership: *"Promote People-Centrality"*

The following key catalysts and inhibitors of organisational leadership factors was applied to the respective cases and validation study and were analysed and compared (**Table 4.8**).

Organisational leadership			
Factors of Influence	**Case Study A**	**Case Study B**	**Validation Study**
Catalysts	▪ Extrinsic anthroprocentric focus ▪ Commitment	▪ Sovereign selection ▪ Social-collective orientation ▪ Transformational leadership ▪ Value-behaviours synonym ▪ Explicitly progressive	▪ Enforcing social values
Inhibitors	▪ Egoistic leadership focus ▪ Strategic disconnect ▪ Operational myopia ▪ Behavioural ambiguity ▪ Selection criteria	▪ Inflexibility	▪ Technical-results driven

Table 4.8 - Organisational Leadership: Cross-Case Factors of Influence. Source: Author

The cross-case analyses of the factors of influence revealed a prominent dialectic between the negative impacts of maintaining a technical-orientated (tech-centric) paradigm, of energy sector organisational leadership, and the positive effects of promoting a people-orientated (people-centric) paradigm, of military organisational leadership. When tech-centric competencies are exalted as paramount for delivering organisational leadership, coupled with promotion and career progression, based almost entirely on technical competencies; and where leaders' performance assessment is centred exclusively on their knowledge; and when individual developmental needs are the sole priority of leadership development, there were certain clear inhibitions for systemic leadership development.

For example, potential inhibitors like *strategic disconnect* and *operational myopia* exposed, that when organisational leadership is tech-centric, mid- to long-term perspectives and responsibilities of leadership are neglected. This is especially negative for systemic leadership development, as definitively it must orientate towards long term organisational impacts. Furthermore, a tech-centric view undermines social collective aspects of systemic leadership development, as shown in the *egoistic leadership focus* factor, where an individual tech-centric orientation contributes towards promulgating egoistic impacts of developmental interventions. This potentially negates systemic aspects of generating collective synergies, organisational development and social structures and processes, as the egoistic emphasis is on individual acquisition of technical competitive advantage over others.

Essentially, in a tech-centric paradigm of organisational leadership, success as a leader is not about social interaction, rather technical competencies and performance justification, through leaders' knowledge and skills. Additionally, the *technical-results driven* factor showed that tech-centric leadership may only focus on generating human capital, where the emphasis is on leaders' personal power and authoritative knowledge, rather than relational and collective development. Indeed, this factor may actually stifle leadership attributes, placing greater emphasis on management and technical skills; perhaps even relegating leadership to the superfluous category. The tension between operational delivery and management, and leadership, may actually move anthropentricism to tertiary status, resulting in a heavy task-focused bias, followed perhaps by a degree of individual needs considerations, but very little team synergy development. This brings the observation in line with extant literature (Hart et al., 2009), and demonstrates a lack of systemic perspective.

However, the cross-case analysis presented an antithetical position, through people-centric orientated organisational leadership. When people-centric competencies, like emotional intelligence and values-based leadership were core to organisational leadership, social interaction emerged as the metric for assessing leadership performance, rather than knowledge; and group-needs, supported by a strong collectively-endorsed moral component, emerged as the paramount priority for organisational leadership. This generated considerable potential catalytic linkages to systemic leadership development. Indeed, people centrality may be achieved by promoting the following:

4.14.1.1 Promote Social-Collective View

For example, the *social-collective*[7] factor revealed that when situating leadership within a social-collective paradigm, it promoted a SAEI perspective of leadership, which was inclined towards social awareness and long term organisational impact; essential aspects of systemic leadership development. This draws the emphasis away from egoistic impact towards collective impact. This also has the potential to positivity affect collective synergies and construction of social structures and processes. The social-collective view was manifest in socially constructed notions of 'team needs come first', 'maintenance of team morale' and 'performance inter-accountability'.

4.14.1.2 Promote External Anthropocentric Focus and Commitment to Good Leadership Practices

Other factors of influence, like *external anthropocentric focus* and *commitment to good leadership practices*, showed that most participants, across both cases and validation study, had an intuitive cognition for people-centred and SAEI-orientated notions of leadership; whether this was manifest as

[7] "Social", in an 'interaction of people' sense; "Collective" in a 'cooperative enterprise' sense.

a strong customer focus or empathy with customer perspectives, or a personal commitment to display good leadership attributes like fairness, relationship management, collaboration, inspiring and engaging others. Sound leadership values were something intrinsically held by the participants, irrespective of the programme, however, those values were exemplified and nourished in the programme where good leadership values were

4.14.1.3 Promote Transformational Leadership Behaviours

Another key people-centric factor for stimulating systemic leadership development was found in *transformational leadership*, which fundamentally generates collective and relational social awareness within organisational environments (Bass, 1985). As it specifically focuses on individualised follower engagement, this forges commitments, trust, goodwill and reciprocity. The observation that transformational leadership was evidently practiced by the training staff also supports systemic leadership development, as it reinforces organisational development alignments and demonstrates extant social structures and processes.

4.14.1.4 Promote Enforcing Social Values and Values-Behavioural Synonymy

Two other people-centric factors were evidently important for shifting organisational leadership into the social capital domain: *values-behavioural synonymy* and *enforcing social values*. These two factors demonstrated that systemic leadership development may be developed through fostering trust, cooperation, and reciprocity within enforcing socially-conducive (SAEI-perspective) behaviours that utterly reflect corporate values. The leadership behaviours sought to be developed on leadership programmes must directly reflect the desirable social values, and their demonstration must be both observed and enforced. In effect, a yard stick must be constructed by which all programme participants can both measure themselves, but also be measured. Essentially, behaviours must reflect values; the values must reflect systemic development needs; and they must all be measured and enforced on the leadership development programme. Such potential catalysts appear to create direct inferential linkages between leaders' behavioural development and systemic leadership development needs; where collective synergies are potentially generated; social imperatives within organisational development are responsibly enforced, with a strong cultural and social awareness; and effective social structures and processes are established through fostering cooperation with systemic organisational needs.

Thus, contrary to the tech-centric paradigm, a people-centric paradigm for organisational leadership will generate a conducive environment for systemic leadership development, as seen below in **Table 4.9**. Below is clearly demonstrated the linkages between promoting people centrality and systemic

leadership development, and shows that by promoting the following six factors within the leadership development programme, systemic development is potentially affected.

What	How (Promote>)	Why (Potential impact on Systemic Leadership Development)
Promote People Centrality	Promote social-collective view	✓ Creates SAEI perspective ✓ Social awareness (across collective synergies, organisational development and social structures and processes) ✓ Long-term organisational impact ✓ Positive collective-relational impact ✓ Generates collective synergies ✓ Social structures and processes
	Promote external anthropocentric focus	✓ Creates SAEI perspective ✓ Social awareness (across collective synergies, organisational development and social structures and processes) ✓ Generates goodwill and reciprocity ✓ Fosters cooperation, coordination and networks
	Promote commitment to good leadership practices	✓ Forges and maintains commitments (collective synergies) ✓ Social awareness (collective synergies) ✓ Supports social and organisational imperatives ✓ Positive cultural development
	Promote transformational leadership behaviours	✓ Positive collective-relational impact ✓ Social awareness (across collective synergies, organisational development and social structures and processes) ✓ Forges commitments ✓ Builds trust, goodwill and reciprocity ✓ Supports social and organisational imperatives ✓ Builds social structures and processes
	Promote enforced social values	✓ Forges and maintains social commitments ✓ Fosters cooperation ✓ Supports feedback ✓ Builds reciprocity ✓ Supports social imperatives ✓ Positive cultural development ✓ Social structures and processes (fosters cooperation, coordination and networks)
	Promote values-behavioural synonymy	✓ Social awareness (across collective synergies, organisational development and social structures and processes) ✓ fostering trust, cooperation, reciprocity ✓ social and organisational imperatives ✓ Reinforces direction and alignments within organisational and cultural development

Table 4.9 - Organisational Leadership: Promote People-Centrality. Source: Author

Moreover, compared against the literature review, the new differentiated perspectives generated through this research creates a deeper, richer appreciation for what is expected of organisational leadership across the respective sectors, and also what the key issues and factors are for improving its application and systemic leadership development.

Table 4.10 summarises these additional perspectives.

	Theoretical perspectives	
Themes	**Extant Literature**	**Cross-case analysis**
Promote social-collective view ***Promote external anthropocentric focus*** ***Promote commitment to good leadership practices*** ***Promote transformational leadership behaviours*** ***Promote enforced social values*** ***Promote values-behavioural synonymy***	Within the energy sector there was an acknowledged shortage of SAEI orientated transformational leadership. This was primarily due to the transposition of technical knowledge and management competencies into the leadership vacuum. There was little explicit understanding or application of social capital building leadership, except for the Safety value. However, the safety value was primarily viewed as a human capital or process management issue, rather than a social-capital leadership behavioural issue. Despite some attempts to mitigate this with 'safety leadership' training, the emphasis is predominately process adherence rather than behavioural. Whereas, the military was recognised for its opposition to human capital development leadership and an innate SAEI orientated leadership approach, which has social capital development and transformational leadership at its heart	Revealed an essential requirement to promote people-centrality in organisational leadership, which exalts those leaders' behaviours that enhance client, staff and partners, within a SAEI orientated view, and furthermore, that enforces a greater commitment to demonstrating good transformational leadership behaviours and practices, where values and behaviours are synonymised into practicably being one in the same thing; with demonstrable, measured behaviours enforcing organisational leadership values. The promotion of people-centrality will draw the emphasis away from tech-centric competencies and human capital focus, towards a social capital development view that supports the creation of systemic leadership development

Table 4.10 - Promote People-Centrality - Differentiated theoretical Perspectives. Source: Author

4.14.2 Training Delivery: *"Select Superhero Trainers"*

A cross-case analysis of the training Delivery factors was applied to the respective cases and validation study and the following key catalysts and inhibitors were compared (**Table 4.11**).

Element One: Training Delivery			
Factors of Influence	**Case Study A**	**Case Study B**	**Validation Study**
Catalysts	▪ Senior leadership experience ▪ Credibility ▪ Role modelling ▪ Links to context ▪ Authority	▪ War-captain perception ▪ Cradle-grave design ▪ Mentor-coach conflation ▪ Systemic-group experience	▪ Authority and connectivity
Inhibitors	▪ Rushed interaction ▪ No authority ▪ No role modelling ▪ No obvious leadership experience ▪ No link to context ▪ No commitment ▪ No structured interaction ▪ No outcomes identified ▪ Poor quality		▪ Lack of credulity and realism

Table 4.11 - Delivery: Cross-Case Factors of Influence. Source: Author

The cross-case analyses of the factors of influence revealed considerable insight into potential criteria for selecting leadership trainers capable of generating systemic leadership development. Insights were drawn out of critical analysis of both inhibitors and catalysts and their potential implications for making assertive recommendations. Indeed, a large portion of insights were gained from the large array of potential inhibiting factors; i.e. what should be avoided. This led to the suggestion of certain criteria for efficacious trainers. The criterion pointed to an exclusive, high calibre, impressive and archetypal character: a sort of superhero trainer. The follow discussion outlines that criterion.

The cross case analysis revealed that leadership trainers should represent an exceptional calibre and archetype of effective organisational leadership; consistent with providing individualised influence and inspirational motivation, as per transformational leadership theory (Burns 1978). Their abilities to influence and inspire behavioural change and development in the participants was inexorably linked to *who* and *what* they were. The critical analysis shed considerable light on the 'who' and 'what' characteristics; thus, providing four criteria.

4.14.2.1 Select more senior relevant experience

It was evident from the analysis, which was unanimous in this point, that it would be desirable to have leadership trainers who have *more senior relevant experience* than the participants. This was seen as contributing to positive perception and coaching effectiveness; in that, trainers could provide rich feedback and challenge, appropriate to the needs of the participants' future leadership roles. It was felt that when the trainer had previously had more senior leadership roles, they were therefore that bit more strategic and could subtly identify the important themes for coaching the participants. The strategic leadership insights they brought allowed the participants to tap into experience further up the 'leadership ladder'. This generates positive coaching reception and engagement between trainer and participants. They were also respected as having done it before, and seen as being successful; and that they had progressed and subsequently know what it takes to win. Conversely, in the data, for example in the *no obvious leadership experience* and *no link to context* potential inhibitors, the criticised trainers also appeared to have no relevant leadership experience in the eyes of the participants. Much of this was correlated with the problem of trainers having a lack of contextual experience. Therefore, trainers should bring 'relevant' leadership experience, either within the organisation or a comparable one, so that explicit contextual linkages can be explicated, and the road to future success and desirable leadership performance is both comparable and relevant for participants. Another key catalyst was seen in the value of having trainers who had successfully completely the same programme previously, and thus able to convey valuable experiential insights and advice.

4.14.2.2 Select Mentor-Coach synthesis

The cross-case analysis revealed a second criteria, in a functional synthesis of having the leadership trainer be both *Mentor-Coach* in one person. It was evident that participants wanted trainers that frequently delivered inspirational guidance on how to lead and behave within the organisation. This was explicit in the factors of influence *role modelling* and *no role modelling*. Indeed, the mentor should be a role-model figure, demonstrating an archetype of what is expected, and should have the necessary authority, either formally or informally, to challenge participants through their development.

The mentor should also possess and provide contextual knowledge of business drivers and steers to help navigate real-world organisational leadership pitfalls and challenges. These should be specific to the organisation conducting the development programme. As mentor, the trainer should provide systemic integration and consistency for the participants; i.e. a recognition that there is an objective

organisational environment with certain cultural and social imperatives and expectations, which guides leadership behaviours and conduct.

The mentor role provides a hugely powerful tool for generating systemic leadership development, as they can provide clear linkages to the requirements of collective synergies, organisational development and extant social structures and processes. The mentor should ideally have formal authority to represent the organisation (discussed in the next criteria), and also come from within the organisation, as there was a shared awareness among the participants that guidance given during the programme, by more senior leaders from within the organisation, represented a systemic standard and expectation, towards which participants must aspire and ultimately achieve.

Furthermore, the efficacy of a mentoring partnership between a trainer and a participant was seen to depend predominantly on how strong the mentor was; emphasising the participants' expectations that the mentor provides systemic guidance and role modelling. A major criticism of extant mentoring, as identified in the inhibitors *no role modelling* and *no commitment*, was the insignificant amounts of time given by the mentors to the mentoring partnership; this is due to the mentor being a different person to the leadership trainer, with less time and structured interaction with participants. This negative factor can be mitigated by combining the mentor, role model, and trainer, educator, roles into one.

Indeed, this brings us onto the other vital aspect of the leadership trainer role: as a modern 21st century educator, using modern pedagogical techniques. Subsequently, coaching, as a sophisticated approach to engendering a reflexive, engaged and empowered learning experience, was seen as being highly successful across both case studies. Certainly, within a 21st century context, coaching methods provide trainers with an approach that utilises transformational leadership and emotional intelligence skills to inspire and engage with the participants in an authentic leadership manner. These are essential aspects for promulgating SAEI orientated leadership and generating systemic leadership development. The considerable value of synthesising the roles of mentor and coach is found in the capability to ensure that the trainers' experience, knowledge and direction are delivered through methods which focus entirely on the recipients understanding, degree of appetite to learn, and development.

A succinct moniker for this mentor-coach synthesis might be:

> *The systemic approach leadership trainer should assume a mentor role, using coaching methods.*

4.14.2.3 Select formal authority figure

The third criteria to emerge in the cross-case analysis was: a Superhero trainer should be a *formal authority figure*. The issue of formal authority was identified extensively in the *authority* catalyst and *no authority* inhibitor. Essentially, energy programme participants felt a lack of formal authority undermined a trainer's ability to influence participants, as they were considered as a peer and not an empowered representative of the organisation. Or indeed, as a formal representation of the organisation's learning needs. This left participants feeling they were left to develop themselves, in a human capital and egoistic sense, and that effectively no learning outcomes were identified and integrated into the development (as seen in the *no outcomes identified* inhibitor). Whereas, in the military programme, the trainers had formal authority, as they were more senior leaders within the same organisation, and this led to greater accountability and motivation in them achieving local and systemic leadership development. Furthermore, with authority comes responsibility, meaning the trainers were under scrutiny for their own performances (and being reported against it) and for maintaining the wider interests of the organisation. This level of responsibility was then manifest in the scrutiny and assessment of participants' performances. This was, in turn, respected and accepted by participants. Thus, as formal authority figures, trainers act as custodians of organisational needs, and conduits of systemic expectations and leadership conduct.

4.14.2.4 Select Trial-by-fire credibility

The fourth criteria reveals that *Trial-by-fire credibility* provides a strong 'superhero' role-modelling and transformational element (idealised influence) to leadership training delivery. By "Trial-by-fire", the author means leaders who have proven themselves in leading frontline business for the organisation, in a widely-recognisable and incontestable fashion; as it were, winning the (metaphoric) medals and acclaim (Showalter, 1988).

Trial-by-fire trainers appreciate relevant contextual applications of leadership. These provide explicit real-world leadership linkages - learnings that "land" [EPP02-033] - to future appointments of the participants (as seen in the catalysts *links to context, cradle-grave design* and *authority and connectivity*, as well as the inhibitor *no link to context*). Trial-by-fire leaders also provide them with archetypes of organisational leadership, which they should emulate (e.g. the catalyst *role-modelling*). This promulgates a social awareness across all factors of systemic leadership development, and aligns participants' forging and maintaining of commitments with social and organisational imperatives. The Trial-by-fire trainers also sustained a systemic design in the programme, by understanding the start-state necessities and the future-state necessities of leadership and organisational development – by

having gone through the programme themselves, previously, and been successful in subsequent appointments.

Trial-by-fire trainers also mitigate the explicit inhibition of lack of credibility, observed in leadership trainers, which was so prevalent in the energy sector case study (see inhibitors *lack of credulity and realism, no role modelling, no obvious leadership experience* and *no link to context*) by demonstrating a thorough knowledge of the organisation's operational leadership needs, and can represent realistically the operating environments in the learning experience. This innate experience, knowledge and awareness for actual systemic organisational leadership needs, rather than theoretical or cursorial sentience, produces credibility. Participants want to learn, as they recognise the relevance and authority of the learnings. Also, being more senior leaders within the same organisation, Trial-by-fire trainers have credibility (see catalysts *senior leadership experience*, *credibility* and *authority and connectivity*) via greater organisational social awareness and connectivity with social structures and processes.

Thus, in summary, by selecting leadership trainers against these four criteria programme owners potentially create superhero trainers that are relevant, authoritative, knowledgeable and inspirational for the participants; generating many potential links to systemic leadership development, as shown in **Table 4.12** below.

What	**How** **(Select>)**	**Why** **(Potential impact on Systemic Leadership Development)**
Select Superhero Trainers	Select more senior relevant experience	✓ Sets direction and alignments ✓ Forges and maintains commitments ✓ Builds trust, cooperation, goodwill and reciprocity ✓ Creates high quality feedback and challenge ✓ Creates social awareness (across collective synergies, organisational development and social structures and processes)
	Select Mentor-Coach synthesis	✓ Encourages collective synergies (full definition) ✓ Supports organisational development (full definition) ✓ Links to social structures and processes (full definition)
	Select formal authority figure	✓ Sets direction and alignments ✓ Forges and maintains commitments ✓ Builds trust, cooperation, goodwill and reciprocity ✓ Creates high quality feedback and challenge ✓ Supports organisational development {full definition)

What	How (Select>)	Why (Potential impact on Systemic Leadership Development)
Select Superhero Trainers (continued)	Select trial-by-fire credibility	✓ Generates social awareness across all factors of systemic leadership development ✓ forges and maintains commitments ✓ Demonstrates social and organisational imperatives ✓ Supports organisational development (full definition) ✓ Links to social structures and processes

Table 4.12 - Delivery: Select Superhero Trainers. Source: Author

Furthermore, viewed against the literature review, the new differentiated perspectives created through this research provides a deeper, richer understanding for how leadership training might be more efficaciously delivered within systemic leadership development.

The following **Table 4.13** summarises these additional perspectives.

	Theoretical perspectives	
Theme	**Extant Literature**	**Cross-case analysis**
Select more senior relevant experience	Extant literature identified a requirement for trainers to have a firm grasp of both pragmatic and theoretical notions of leadership practice, to a higher degree than the participants. Also, greater clarity is needed as to objectives of the training interventions, as well as more efficacious linkages between training delivery content and competencies into day-to-day workplace activities, as this was seen as extremely difficult	It was revealed that trainers who had more senior and contextually relevant experience than the participants received increased positive perception and enhanced coaching effectiveness. Those trainers could provide rich feedback and challenge, contextually directly linked to the needs of the participants' future leadership roles. It was felt that they were also that bit more strategic and could subtly identify the important themes for coaching participants within the organisational context. Subsequently, they were also respected as having done it before and viewed as being successful; and that they had progressed and subsequently know what it takes to practice effective leadership
Select mentor-coach synthesis	The quality of delivery was widely perceived to be poor, with poor linkages to real-world leadership challenges and also a need to focus on up-skilling trainers in education methods. There were also negative impacts of a lack of credibility and track record amongst trainers	There was clear evidential systemic value in a functional synthesis of having the leadership trainer be both *Mentor-Coach* in one person. The mentor role provides an archetype of what is expected, indeed, representing organisational needs, and should be invested with the necessary authority to challenge and direct participants through their development; whereas, the coach role utilises a sophisticated pedagogical approach to engendering a reflexive, engaged and empowered learning experience; one that utilises transformational leadership and emotional intelligence to inspire and engage participants in an authentic leadership mode. The mentor role is trainer-centric, the coach role is participant-centric: both are essential. Thus, within a systemic approach, a leadership trainer should assume a mentor role, using coaching methods
Select formal authority figure	It has been proposed that utilising inappropriate trainers can account for a lack of development in participants. This may also come from a difficulty in the trainers linking the training delivery content and competencies into day-to-day workplace activities. Also, it is observed that the predominance of utilising external training service providers or academics may account for some of the inappropriateness and lack of contextualisation	It was shown that by utilising trainers who embody formal authority figures - as more senior leaders within the same organisation - this leads to greater accountability and motivation across both trainer and participants, in achieving both local (human) and systemic (social) leadership development, as the trainers were considered as empowered representatives of the organisation, not merely peers or external, unaccountable consultants. As the trainers have formal authority, this generated increased self-awareness of their own training responsibilities and increased trainer performance and scrutiny, as well as maintaining and representing the wider interests of the organisation. This awareness of responsibility was then manifest in the scrutiny and assessment of participants' performances, which, in turn, was respected and accepted by participants. Thus, as formal authority figures, trainers act as formal custodians of systemic leadership needs and expectations

		Theoretical perspectives (continued)
Select trial-by-fire credibility	Leadership trainers should be highly credible and with a track record for success. They should moreover link the training delivery content and competencies into day-to-day workplace activities	It was revealed that having a strong 'superhero' role-model trainer produced a positive transformational idealised influence. Utilising trainers who have proven themselves in leading successfully in frontline business for the organisation, in a widely-recognisable and incontestable fashion, produces a positive engagement with participants. It also ensures trainers appreciate relevant contextual applications of leadership and can provide explicit real-world linkages. Also, having successful, battle-hardened, frontline leaders as trainers, mitigates the explicit inhibition of lack of credibility

Table 4.13 - Delivery: Select Superhero Trainers - Differentiated theoretical Perspectives. Source: Author

4.14.3 Contextualisation: *"Make Context King"*

A cross-case analysis of Contextualisation factors was applied to the respective cases and validation study and the following key catalysts and inhibitors were critically compared (**Table 4.14**).

Element Two: Contextualisation			
Factors of Influence	**Case Study A**	**Case Study B**	**Validation Study**
Catalysts	▪ Corporate synergy focus	▪ Scenario-based ▪ Pervading context	
Inhibitors	▪ Context paradox ▪ Ungrounded context ▪ Limited future-context link	▪ Immediacy bias ▪ Perceived negativity	▪ Real-world disconnect

Table 4.14 - Contextualisation: Cross-Case Factors of Influence. Source: Author

The cross-case analyses of the factors of influence revealed a need for the paramountcy of context within the developmental experiences. When real-world context was not explicitly integrated, participants were left to intuitively cherry-pick learnings; dependent on their own egoistic motivations. Indeed, without applying real-world context, participants were nescient of organisational leadership expectations. Although context did not appear to be essential for human capital leader development, in that, participants reported acquiring new individual skills (such as, an analytical skills or negotiation techniques) it was essential for social capital and systemic leadership development. In this regard, the inferential systemic benefits of correctly applied context were explicit in the cross-case study analysis. By correctly applied context, it is meant explicating pragmatic real-world, day-to-day applications of good organisational leadership in the learning experience. Benefits of achieving this, as revealed in the analysis, covered content relevance and motivation to learn, scrutiny and accountability, behavioural expectations, skills application and a wider social awareness of applied organisational leadership. Within systemic leadership development, context is not superfluous, rather essential. It is the heart of applying SAEI leadership into the real-world and generating social capital leadership. In short, context is king.

The cross-case analysis revealed three key factors for making context king:

- Context the backbone of programme design
- Assessment of participants' performances against context
- Direct connectivity with next leadership appointment

4.14.3.1 Make context the backbone of programme design

Rather than being categorised as superfluous and even incompatible (across participants' differentiated contextual domains) - as per the energy case study – real world context was viewed as central to the military case study design. It was the significant golden thread of continuity throughout all aspects of the programme. This had clear benefits for systemic leadership development. Whereas the energy case study suffered from real-world disconnect (as discussed in the *real-world disconnect* inhibitor), where both trainers and participants failed to generate direct linkages to their day-job leadership experiences. This reality-disconnect inhibits systemic development across social and environmental considerations, as they are not explicitly addressed. Furthermore, organisational development and creation of social structures and processes, suffers, as extrinsic, systemic needs remain untouched, allowing for the continued promulgation of localised, egoistic development.

By contrast, the golden thread application of real-world context to the military programme, had explicit systemic leadership development benefits. The learning and development experience was fundamentally situated in a collective-relational environment, where participants lived together 24/7 for the duration of the programme, in simulated real-world team environments, mirroring organisational team dynamics and tasks (i.e. scenario-based simulations and exercises). It was in this context - with replicated hierarchies, tasks and responsibilities, routine and scrutiny - that leaders gained intimate familiarity with the organisation's systemic leadership needs. In this learning environment, individualism, and indeed, egoistic motivations, were openly challenged and remediated. The leadership context, for the military, was inherently relational and social; it was not superfluous, it was sacrosanct. Everything revolved around the real-world context.

It is worth noting that this was achieved by:

- Identifying a minimum commonality of context across all participants, so that the context is relevant to all participants, regardless of subsequent leadership role[8]. This limits content to the essentials, avoiding specialist nuances, but finding the common ground in leadership competencies rather than technical.
- All learning was orientated towards the next leadership appoint. This was integrated into daily learning

[8] Which can often be widely diverse, for example, one person might go onto be an educator, the other a combat infantry commander

- The context was progressive in complexity; starting with values and moral component, building up to greater levels of complexity in scenarios, but always reinforcing the key leadership elements and organisational values
- Heavy use of scenario-based learning. Literally dozens of scenarios were generated on the programme in order to allow every participant to practice and rehearse leadership performance through those simulated environments
- Participants were regularly critiqued against next appointment, through the scenario-based exercises and routine team interactions (discussed more below)
- All learning experiences were situated within social and environmental contexts. Resulting in a relational-collective orientation, ideally suiting systemic leadership development
- The full integration of real-world context allowed the organisation to set expectations and direction for individual learning, and monitor output
- Facilitates habitual leadership behaviours in the correct context; generating predictability for the organisation and confidence for the participant
- Trainers and course-designer have mutual real-world understanding of the context (therefore making contextualisation less problematic)

As demonstrated in the *pervading context* catalyst, linkages between day-to-day leadership behaviours and challenges, and higher strategic needs, supports systemic organisational development and long term organisational impact. The cross-case analysis revealed this was only possible when there was clarity over how to integrate context and a commitment to incorporate it deeply into the programme design.

However, if there is credence to make context the backbone of programme design, this will potentially generate strong collective social awareness across the organisation; fostering trust, goodwill and reciprocity as leaders generate empathy and understanding for subsequent pragmatic leadership challenges. It has the potential to promote organisational development through greater alignments of social and organisational imperatives; as well as broadening the social structures and processes of the organisation, through the vast array of replicated scenarios and simulations.

Furthermore, contextualised leadership development promotes the systemic, as it situates leadership behaviours in an externalised world, rather than internalised.

4.14.3.2 Make assessment of participants' performances against context

A second imperative for making context paramount is assessing participants' performance on the programme against organisational expectations of leadership within certain contextual simulations. This is important as to promulgate desirable leadership styles and align behaviours with environmental needs and expectations. On the military programme this assessment was made possible by two factors: one, that leadership trainers had intuitive knowledge and innate experience of what sort of leadership is most effective in the real-world context (and have themselves been appraised as being exemplars of that leadership, therefore being selected as trainers); and two, that the learning objectives of the programme were inseparably aligned to needs of the subsequent contextual environment (i.e. the objectives were intended to be assessed and achieved through contextual simulations). Assessment revealed to be a strong factor in participants' adopting new situational leadership behaviours, as they reacted to the scrutiny and appraisal by raising their game and changing their individual leadership styles to conform to the systemic needs of the context.

This heightened awareness of organisational needs - generated through individual performance assessment - was demonstrably shared collectively by the programme cohort, and resulted in collective shifts in behaviours (indeed, possibly, progressive shifts across the programme). This was strongly evident in the military case study, and characterises the importance of socially constructed views of organisational leadership, where a natural consequence of this phenomena was the systemic development of collective synergies, social awareness and social structures and processes.

4.14.3.3 Make direct connectivity with next leadership appointment

It was acknowledged in the within-case analysis for Case Study B that there was a potential inhibition (the *immediacy bias* factor) in focusing predominantly on the needs of the next appointment (i.e. possible lack of long-termism). However, when considering the wider effects this has on developing situational leadership, which is entirely contextually appropriate, there is an incontrovertible immediate benefit at the systemic, organisational level. In creating direct connectivity with the next leadership appointment, the programme generates tangible organisational benefits, through satisfying immediate organisational development imperatives, team building across a peerage of leaders, and achieving immediate integration with relevant social and network systems.

In summary, in order for systemic leadership development to generate skills and behaviours that are firmly situated, or rooted, in real-world interactions, interventions must elevate contextualisation as perhaps the most important factor; incorporated into every aspect, from design to delivery. This elevation should be re-enforced again and again, with daily linkages explicated. These provide real-

world connectivity for developing leaders, and therefore, simulate contexts which resemble and reflect organisational realities. Leadership should be rooted in these organisational realities, like the trunk of a tree growing out of the roots. This trunk is the context for leadership development; without it, the notion of developing effective leadership is as paradoxical as growing a tree without a trunk.

Thus, by making context 'king' through applying these three principles of (1) making context the backbone of programme design, (2) assessing participants' performances against context, and (3) direct connectivity with the next leadership appointment, organisations can create strong potential links to systemic leadership development, as shown in **Table 4.15** below.

What	**How** **(Make>)**	**Why** **(Potential impact on Systemic Leadership Development)**
Make Context King	Make context the backbone of programme design	✓ Sets direction and alignments ✓ Forges and maintains commitments ✓ Builds trust, cooperation, goodwill and reciprocity ✓ Creates high quality feedback and challenge ✓ Creates social awareness (across collective synergies, organisational development and social structures and processes)
	Make assessment of participants' performances against context	✓ Encourages collective synergies (full definition) ✓ Supports organisational development {full definition) ✓ Links to social structures and processes (full definition)
	Make direct connectivity with next leadership appointment	✓ Sets direction and alignments ✓ Forges and maintains commitments ✓ Builds trust, cooperation, goodwill and reciprocity ✓ Creates high quality feedback and challenge ✓ Supports organisational development {full definition)

Table 4.15 - Contextualisation: Make Context King. Source: Author

Therefore, viewed against the literature review, the new differentiated perspectives generated through this research creates a deeper, richer appreciation for how contextualisation can be more efficaciously integrated with systemic leadership development. **Table 4.16** summarises these additional perspectives.

	Theoretical perspectives	
Theme	**Extant Literature**	**Cross-case analysis**
Make context the backbone of programme design	The literature revealed that programmes generally suffer from content which is too broad and generic to be applicable to day-to-day real life work. In reality, many attempts to integrate contextualisation have exposed a catalogue of insufficiency and ineffectiveness. Consequently, there has been a call for pervasive integration of programme content and day-to-day workplace activities	Purposefully committing to 'golden thread' application of context throughout all aspects of the programme - within simulated real-world team environments (mirroring organisational team dynamics), replicated hierarchies, tasks and responsibilities, routine and scrutiny - results in participants gaining intimate familiarity with organisational systemic leadership needs. Furthermore, in this fully contextualised learning environment, individualism and egoistic motivations were openly challenged and remediated
Make assessment of participants' performances against context	Leadership development interventions should strive to apply action learning group-work, real-life simulations and contextual scenarios, within which desirable organisational leadership competencies might be nurtured	It is essential to assess participants' performances whilst on the programme against organisational expectations of leadership within given contextual simulations. This is imperative as to develop desirable leadership styles and align behaviours with environmental systemic needs and expectations. Heightened awareness of organisational needs - through performance scrutiny - was shared collectively by the programme cohort, and resulted in collective shifts in behaviours
Make direct connectivity with next leadership appointment	Extant research suggests effective leadership development requires actors to learn from their work, in their work, and with real-life work issues; thus, requiring direct links to these issues. However, in practice, interventions suffer from content that is too broad and generic to be applicable to day-to-day real life	By having direct connectivity with the next leadership appointment, through contextualised content and successive assured promotion, the programme generates tangible organisational benefits, such as satisfying immediate organisational development imperatives (e.g. succession needs and talent management), team building across a peerage of leaders, and achieving immediate integration with relevant social and network systems

Table 4.16 - Contextualisation: Make Context King - Differentiated theoretical Perspectives. Source: Author

4.14.4 Performance: *"Challenge Pascal's Problem"*

A cross-case analysis of Performance factors was applied to the respective cases and validation study and the following key catalysts and inhibitors were critically compared (**Table 4.17**).

Element Three: Performance			
Factors of Influence	**Case Study A**	**Case Study B**	**Validation Study**
Catalysts	▪ 360 degree effectiveness ▪ Reflexive commitment	▪ Explicit meritocracy ▪ Continuous challenge and scrutiny	▪ Great discomfort and challenge ▪ Crash test environment
Inhibitors	▪ Unstructured feedback ▪ Feedback illusion ▪ Challenge and remediation	▪ Discomfort and ostricisation	▪ Avoiding personal criticism

Table 4.17 - Performance: Cross-Case Factors of Influence. Source: Author

The cross-case analysis of the factors of influence revealed important insights into how the performance of programme participants might be better assessed and enhanced. The insights revolved around how egotistically-rooted inhibitions of participants, and their inclination to avoid uncomfortable critique and focus learnings on personal desires, which naturally gravitates away from intrinsic weaknesses and short-comings, can limit systemic leadership development, as it confines performance improvement to areas of personal comfort and motivation, not organisational leadership needs; which must exalt team-building, cultural and organisational development imperatives. Equally, the unwillingness of the trainers to challenge egotism and comfort-zones, posed a limitation for systemic leadership development, for the same reasons.

Therefore, effective systemic leadership development must incorporate ways to challenge Pascal's problem of egotism and facilitate candid and transparent performance assessment, so that participants may conform to organisational expectations, even if this involves significant discomfort and direct challenges to their extant views of self and learning.

The cross-case analysis revealed a two part theoretical solution for how one might challenge Pascal's problem in leadership development programmes. They focus on systemic organisational factors, particularly environmental and social dynamics when assessing performance, through:

- Challenging with systematic social scrutiny, and
- Challenge by destroying the comfort zone

These factors were stark in the cross-case analysis and provide new perspectives in shaping performance assessment.

4.14.4.1 Challenge with systematic social scrutiny

Firstly, an important factor in challenging Pascal's problem is scrutinising participants' performances against a given contracted standard. This standard must be explicitly defined and integrated into the programme (much like the "Ten Leadership Dimensions" of Case Study B). Scrutiny of performance only works effectively if there is a clear criterion against which to measure it; in order for that to be systemic, the criterion must contain organisational and social development needs, rather than merely promote self-driven egoistic needs. This standard should act as a model of desirable organisational leadership, with explicit performance expectations, which the participants must conform to and demonstrate, through a mediating relationship of learn > perform > receive scrutiny > reflect and adapt > perform. Receiving scrutiny acts as a key catalyst for individual reflection and adaption, against organisational learning expectations, and subsequent changes in future performance.

Furthermore, the scrutiny must be fair, transparent and consistent across all participants. All must experience the same sort, and degree, of individual performance scrutiny. It should also be a social critique, open to the engagement and observations of others, through 360 multi-rater feedback from programme peers as well as training staff. This inclusive approach to performance feedback promotes a strong relational orientation and socially-aware and -responsive approach. This was a strong factor in Case Study B, and reflected in the potential catalysts *360 degree effectiveness, reflexive commitment, challenge* and *remediation and explicit meritocracy*, that when performance assessment was socially-based it appeared to be more efficacious, resulting in greater individual compulsion for behavioural change and conformity. Here social awareness is a key component of systemic leadership development, with learning being a collective-relational, and thus social, phenomenon. It was evident that when participants were willing to have their performances openly and socially critiqued, and adjusted, this had an effect on systemic leadership development through forging of commitments, cooperation and goodwill towards the expectations of organisational leadership. In this sense, the conformity appears as a form of institutionalisation.

This social scrutiny approach should also be systematic for consistency and replicability. 'When', 'where' and 'how' individuals receive performance feedback must be standardised and consistent across the experiences of all participants. This is to counteract inhibition, preferential treatment, biases and discrimination, and to demonstrate fairness, predictability and commitment. The potential inhibitive factors *unstructured feedback* and *feedback illusion* demonstrated that an unstructured

performance feedback approach, which was self-orientated and -driven, is potentially contrary to a systemic development approach as it does not systematically align individuals to systemic social and organisational imperatives, nor does it foster a culture of collective alignments and commitments, but rather an egoistic, local development focus. Thus, the systematic approach to scrutiny must assume established and adopted processes and procedures, and be adequately recorded for review and follow-up. It should also have a full-programme-cycle view and integration, from learnings on day-one of the programme, through developing and demonstrating the leadership behaviours criteria, to achieving the desired end-state and completing the programme. A systematic approach will support objective scrutiny. It will also allow replacement and reorganisation of training staff, as all participants' performance records should follow the same system, therefore be easily handed over.

Therefore, the systematic social scrutiny approach to challenging performance, applies a performance feedback system that integrates self-assessment, peer assessment and management scrutiny. This systematic approach generates a certain degree of objectivity and realism that is both persuasive and constructive with participants. The sheer volume of challenging feedback and scrutiny was significant to the point of generating the sort of life-stream impact required to generate effective leadership development (Avolio, 2005). Done this way, the social nature of performance review and feedback has a potential catalyst effect in forging and maintaining commitments, feedback and challenge, within collective synergies; and integration with social structures and process; as well as generating holistic social awareness across all three principle factors of systemic leadership development. Also, egoistic illusions appear difficult to maintain in an environment where honest and provocative feedback is systematically delivered to participants, in a hugely transparent fashion.

In nuce, for systemic leadership development to occur on programmes, there should be a commitment to apply systematic social scrutiny of participants' performance, through continuous challenge and scrutiny, which is social, fair and open, and that unavoidably encompasses all participants, using structured approaches which are consistent and standardised.

4.14.4.2 Challenge by destroying the comfort zone

Secondly, in order that Pascal's Problem be effectively challenged, the analysis revealed that participants should have their comfort zones dramatically shaken, even destroyed. Indeed, perhaps paradoxically, the analysis showed that by allowing participants to exist within comfortable learning zones, either individually or as groups, this facilitated aversions within participants to receive critical scrutiny or, conversely, the trainers to critically scrutinise participants. It was not evident in the research that comfortable environments have a positive impact on learning with regards to systemic

leadership development. This was evident in the potential inhibitive factors of *avoiding personal criticism, challenge and remediation* and *discomfort and ostricisation*. These factors essentially revealed that by avoiding challenging, and potentially negative, performance feedback, this may facilitate negative systemic effects by allowing misalignments and misunderstandings in the participants' notions of leadership and organisational imperatives. Negative leader behaviours, such as egoistic development focus, acutely manifest through 'prima donna' syndrome or toxic leadership - which inhibit systemic leadership development - may be unchecked and allowed to recycle back in to the organisation. Unchecked egoistic behaviour may fail to enforce an extrinsic set of organisational performance expectations, of certain behaviours and interactions, on programme participants. This may inhibit organisational development needs, such as social and organisational imperatives. It may also inhibit the systemic development of collective synergies, through insufficiently defined expectations around trust, cooperation, goodwill and reciprocity. Equally, without clarity regarding what constitutes efficacious social structures and processes, and how leadership practicably maintains them, there is a potential risk of failing to generate key elements of systemic leadership development.

Whilst there was evidence that when the learning environment was challenging and discomforting (i.e. *discomfort and ostracisation* factor), it may potentially have negative effects on participants (resulting in them disengaging with the learning experience), however, the negativity was borne of a conflict between egoistic individual needs and social organisational needs. Thus, the research revealed that participants may in fact dislike, at most, or feel uncomfortable, at least, with the learning experience, yet still achieve efficacious systemic leadership development. An important implication then is that, at times, participants may criticise the experience and training delivery, putting pressure and scrutiny on trainers and programme management, however, this criticism may not reveal anything negative about the effectiveness of the learning experience and leadership development, and may in fact reveal only that a discomforting environment has been constructed.

However, evidence that a discomforting environment has a positive effect on generating systemic leadership development was widespread in the analysis, markedly represented in the factors *continuous scrutiny and challenge, great discomfort and challenge* and *crash test environmen*t. By shaking-up individual comfort zones, though robustly challenging participants' performances, even in an unsettling manner, by continuous observation and challenging feedback, through enforcing the development of desirable leadership behaviours and skills, this will potentially lead to systemic leadership development, as organisational needs and standards are demonstrably elevated above egoistic needs. This also supports clear and collectively-aligned social awareness, where unconducive leadership behaviours are harder to maintain and disguise, and tolerated less by the group. A key

element of destroying the comfort zone is challenging unconducive behaviours, or the absence of necessary behaviours, by hitting the issue head-on. This direct route would mitigate the potential inhibitive factor *avoiding personal criticism*.

It must be pointed out that destroying the comfort zone does not necessarily undermine participants' feelings of safety and error-tolerance within the learning environment. On the contrary, the *crash test environment* factor of influence revealed that participants felt safe if subsequent remediation was given for mistakes and clear guidance and coaching was provided for performance improvement. As participants felt personal improvement in their performances against organisational expectations - manifest through the training delivery - they felt greater levels of security and confidence in their future performances. In this sense, participants were encouraged to try and fail, adjust and improve, on their immediate previous performance. As all participants were immersed in the same learning environment, participants felt safe to adapt and change their own leadership style and behaviours without fear of fellow-participant, as well as wider organisational, scrutiny or criticism. Also, the 'crash test' process of challenging and testing personal performance, is systemically linked and validated by the success and application of other leaders back in the operational environment, who have previously gone through the same process. Therefore, the broader long-term application of the products of the performance review and appraisal, and thus justification for the challenge and scrutiny, are clearly evident to programme participants, and provide valuable social awareness across all aspects of the systemic leadership development definition.

Perhaps there is some familiarity with this notion of destroying the comfort zone and the realisation of Tom Sawyer in Mark Twain's *The Adventures of Tom Sayer* (1876):

> "*He had discovered a great law of human action, without knowing it – namely, that in order to make a man or a boy covet a thing, it is only necessary to make the thing difficult to attain"* (pg 54)

Thus, when addressing the challenges of generating systemic leadership development through managing participants' performances, this research revealed that interventions must face up to Pascal's problem of egotism, by facilitating candid and transparent performance assessment; so that participants are aware of desirable organisational leadership expectations and conform to those expectations, even if this involves significant discomfort and direct challenge to individuals' extant views of self and leadership. This level of challenge and scrutiny is needed so that the systemic leadership needs of the business are significantly reinforced and trump those egoistic drivers, and also, so that significant levels of challenge and learning conflict are created in order for leadership

development to occur (Avolio, 2005). In order for a significant level of feedback to occur, for each participant, so that individual performances can align and improve over the programme period, a commitment must be made to systematically apply performance appraisal and to conduct it with social context and multiple perspectives integrated.

By challenging Pascal's Problem of egotism, through constructing a learning environment where there is sufficient challenge to trigger change, organisations can create strong potential links to systemic leadership development through (1) systemic social scrutiny, and (2) destroy comfort zone, as shown in **Table 4.18**.

What	How (Challenge>)	Why (Potential impact on Systemic Leadership Development)
Challenge Pascal's Problem	Challenge by systematic social scrutiny	✓ Sets direction and alignments ✓ Forges and maintains commitments ✓ Builds trust, cooperation, goodwill and reciprocity ✓ Creates high quality feedback and challenge ✓ Creates social awareness (across collective synergies, organisational development and social structures and processes)
	Challenge by destroying the comfort zone	✓ Encourages collective synergies (full definition) ✓ Supports organisational development {full definition) ✓ Links to social structures and processes (full definition)

Table 4.18 - Performance: Challenge Pascal's Problem. Source: Author

Therefore, viewed against the literature review, the new differentiated perspectives created through this research provides a deeper, richer appreciation for how participants' performances on programmes might be more efficaciously nurtured within systemic leadership development. The following **Table 4.19** summarises these additional perspectives.

	Theoretical perspectives	
Theme	**Extant Literature**	**Cross-case analysis**
Challenge by systematic social scrutiny	Extant literature identifies that the individual performances of participants conducting leadership development is fundamental to the efficacy of the learning experience and that performance feedback has a vital role.	It was revealed that scrutiny of performance only works effectively if there is a clear criterion, which contains direct linkages to organisational and social development needs, against which to measure performance.
	However, research is virtually unanimous in acknowledging that, in reality, insufficient developmental performance feedback is occurring. Possibly, assessing leaders' performances may be difficult due to Pascal's (1670) problem of egotism, which counter-acts transparency, self-awareness and self-regulation, by hiding and avoiding personal criticism of inherent weaknesses, with this deception being insentiently enforced by a reciprocally beneficial social contract of mutual delusion. This deception may inhibit leadership development, as addressing issues which may invoke embarrassment or offence, for the leader or trainer, are taboo and avoided.	Performance scrutiny must be fair, transparent and consistent across all participants, with everyone experiencing the same type, and degree, of individual performance scrutiny. It should also be a social critique, open to the engagement and observations of others, through 360 multi-rater peer feedback as well as from training staff. This social scrutiny approach should also be systematic (i.e. when, where, how, who and what) for consistency and replicability; so as to counteract inhibition, preferential treatment, biases and discrimination, and to demonstrate fairness, predictability and commitment
Challenge by destroying the comfort zone	Despite recognition that leadership development learning environments should be 'safe places' for open discussion, in reality this has not been explored in depth as to how openly challenging and uncomfortable experiences can have a positive learning impact on participants and organisations. Indeed, there is a strong partiality in the literature to promote positive feedback, however, this may fall short of Avolio's (2005) assertion that no meaningful development occurs without challenge or conflict in leadership development	Rather than efficacious systemic leadership development being generated in safe learning environments, this research revealed that by destroying individuals' comfort zones, though robustly challenging their performances, even in an unsettling manner, by continuous critical observation and challenging feedback, through enforcing the development of defined desirable leadership behaviours and skills, this will potentially lead more efficaciously to systemic leadership development, as organisational needs and standards are demonstrably elevated above egoistic needs

Table 4.19 - Performance: Challenge Pascal's Problem - Differentiated Theoretical Perspectives. Source: Author

4.14.5 Impact: *"Avoid Isolationism"*

A cross-case analysis of Impact factors was applied to the respective cases and validation study and the following key catalysts and inhibitors were critically compared (**Table 4.20**).

Element Four: Impact			
Factors of Influence	**Case Study A**	**Case Study B**	**Validation Study**
Catalysts	▪ Confidence and engagement	▪ Immediate successive promotion ▪ Symbolic victory ▪ Immersion ▪ Systemic inclusion & quantity	
Inhibitors	▪ Isolationism ▪ Reality disconnect ▪ Egoistic expectations	▪ Gender bias ▪ Conformity resistance	▪ Egoistic agenda ▪ Values-inauthenticity-impact ▪ Social disconnect

Table 4.20 - Impact: Cross-Case Factors of Influence. Source: Author

A full analysis of the factors of influence reveals that systemic leadership development could be more efficacious through avoiding the isolation of certain factors of the programme and by considering better ways to integrate and inter-connect these elements. When isolated, those factors evidentially have a direct impact on key systemic definitional aspects, therefore, to mitigate inhibitions created by their isolation, programmes can affect directly the research problem outlined in Chapter One.

The specific isolating factors to come out of the cross-case analysis are:

- Negligible linkages to real-world challenges
- Little social interaction with the wider organisation
- Limited opportunities for successive promotion, and
- Diminutive amounts of mid-level leaders participating on programmes

These isolating factors emerged clearly from the analysis and constitute four important issues to *avoid*. Indeed, they present significant challenges to achieving systemic development and must be fundamental considerations when considering what impact is intended and measured when evaluating leadership interventions. Thus, by specifically avoiding these issues, programmes can have a greater impact on systemic leadership development.

4.14.5.1 Avoid negligible linkages to real-world challenges

The analysis exposed that when programmes generated negligible linkages to real-world challenges of organisational leadership, the learning experience was disconnected from context, both strategically and operationally. Without substantial linkages to systemic and strategy factors, such as setting direction and alignments or organisational imperatives, the learnings were dislocated with leadership realities, resulting in leadership development which is non-contextualised and ungrounded in contextually tried and tested behaviours and skills. Indeed, without rigorously recreating real-world challenges, and developing organisational leadership appropriate to those, the learning of participants remained isolated from the affairs and interests of the organisation and its constituents.

The *isolationism* and *reality disconnect* factors from the case studies revealed what negative effects these negligible linkages have on systemic leadership, where participants felt their efforts were wasted as they were not recognised as being relevant for the organisation's needs. This appeared to have a negative effect on the individual and organisation forging and maintaining commitments, based on trust, goodwill and reciprocity. Further evidence for this was seen in the *values-inauthenticity-impact* factor, which suggested that when the programme failed to convincingly re-enforce or communicate corporate values, and demonstrate clearly what they mean for systemic leadership needs - like collective synergies, social and organisational imperatives, cultural development and social awareness - the participants either failed to appreciate their importance, or indeed they conflicted with participants' own value systems, and potentially led to adverse feelings of incompatibility and subsequent disengagement with, and even departure from, the organisation (as seen in the *egoistic expectations* factor of influence). These observations revealed that generating negligible linkages to real-world leadership factors can significantly undermine systemic leadership development.

Furthermore, by isolating the learning experiences of participants from development that specifically and significantly addresses real-world leadership challenges, there is a potential that egoistic development needs trump organisational needs, as seen in the *egoistic expectations* factor. This factor of influence, from Case Study A, shows that a predominance of egoistic expectations potentially leads to an 'expectations-reality conflict', producing disgruntled and dissatisfied leaders departing the organisation. The expectations of leaders within the organisation must be explicitly and compellingly revisited throughout the programme (as reflected in the *Immersion* factor from Case Study B), to the point where they are brought nearer in alignment to systemic leadership development needs. This closer alignment produces, within the participants, greater confidence and clearer purpose as to what is required and successful in organisational leadership. Where this alignment was extant, for example

in Case Study B, there were no reported examples of not retaining leaders after the completion of the programme.

Importantly, a lack of alignment of egoistic and organisational expectations, through a failure to generate and integrate significant real-world simulations and applications, may promulgate the potential inhibitor *conformity resistance,* with its negative effects on developing collective synergies, as well as integration with social and network systems, particularly within participants' groupings. Participants that fail to conform to organisational leadership needs, or perhaps even depart from the organisation subsequent to the programme, represent a real challenge in systemic leadership development, as collective synergies and social structures and process are directly affected, as the continuity and trust is broken. It also provides particular challenges for promulgating organisational development messages, as key protagonists - mid-level leaders - keep changing, with the resultant loss in leadership development.

Indeed, without generating and re-enforcing effective real-world leadership behaviours, programmes may fail to have a systemic impact on the e*goistic agenda* of participants, which revealed the purposive motivation for participants engaging with development was primarily personal career development, rather than aligning with wider social or organisational imperatives. If indeed, this is a default setting for participants, and left unchallenged, organisations may labour heavily with having any positive impact on systemic leadership development.

Therefore, negligible, inferential links, which rely on individuals to draw out workplace connections, if they wish, is potentially insufficient for systemic leadership development. Rather than isolating the learning experience in a personal development space, programmes should focus on re-creating real-world simulations of effective organisational leadership, where appropriate behaviours are explicit and engendered.

4.14.5.2 Avoid little Social interaction with the wider organisation

The cross-case analysis of factors of influence revealed that little social interaction between participants on the programme and the wider organisation potentially inhibits systemic leadership development, as it inhibits the generation of all three key systemic aspects, collective synergies, organisational development and integration with existing social structures and processes. In fact, little social interaction with the wider organisation is perhaps one of the most debilitating factors for systemic leadership development, as social capital development is principally limited to merely within the programme environment, rather than extended to include wider organisational interests and

representations. This inhibits both the potential effects of the programme on the wider organisation and vice versa.

Isolating social interactions to almost wholly within the programme training environment appeared to create a potential systemic inhibition, as seen in the *social disconnect* factor. This factor revealed that inadequately situated and integrated leadership development with wider organisational social contexts, and not prescriptively targeting the development of efficacious social interactions (particularly with next appointment), the programme may have little impact beyond mere egoistic leader development. As a key element of systemic leadership development is to incorporate a collective and relational orientation, with the idea of contributing to long term organisational impact: this potential inhibitor impedes this important systemic view.

Contrariwise, rather than isolating social interaction, the programme should aim to utterly immerse the learning environment in wider-organisational interactions, as seen in the *immersion* factor of influence. This immersive environment should integrate and connect the social and network systems of the organisation (such as command appointments on the programme and operational management structures) and replicate real-world environments, as well as generate considerable team building and commitment. Social awareness, with regards to organisational leadership needs and expectations, is heightened through this immersion. The immersive factor also appeared to focus participants' minds on organisational leadership imperatives and realities - creating a single-mindedness in desirable leadership approach; one which fits into the view of organisational leadership. This is linked to the creation of organisation-wide social structures and networks; using the newly developed leaders as key network enablers of direction, alignments and imperatives.

Examples of potential ways to widen social interaction beyond the programme and across the organisation were seen in Case Study B:

- Leadership trainers are members of the organisation
- Senior managers deliver on programme
- Some leadership training is delivered alongside operations
- Linkages to next appointment personnel (interviews, social events, team meetings, senior managers)
- HR representatives integrated with programme (perhaps providing contributions)

- Operating managers briefing participants on current activities and challenges (tales from the frontline)
- Familiarisation visits to different organisation departments and frontline operations

Essentially, the analysis revealed that programmes must avoid isolating the learning experience, by having little social interaction with the wider organisation, but instead, should focus on embedding the programme within the organisation, and vice versa.

4.14.5.3 Avoid limited opportunities for successive promotion

It was also evidential that by limiting participants' opportunities for immediate successive promotion, through failing to explicitly connect this vital issue with the programme, this had a negative effect on systemic leadership development. The programme is then merely an isolated personal development experience. As identified in Case Study A, there was no evidence at all of any systematic attempt to consider the career prospects of participants after successful completion of the programme. Consequently, participants felt that the developmental experience was dislocated from the organisational workplace, with career development being a personal driven issue, which, in fact, has no particular loyalty or future vision within the current organisation. Without explicitly showing each and every participant 'what place' they had in the future of the organisation, the programme potentially fails to step beyond merely connecting with egoistic needs and intentions.

Conversely, in Case Study B, the potential catalyst *immediate successive promotion* revealed that providing immediate promotion for each participant satisfies systemic organisational needs, as well as personal development needs and desires. The organisation identifies promotion opportunities that match organisational development imperatives and gaps, whilst taking into account individual needs and expectations. Having an assured reward from successful programme completion creates an important link between egoistic, local development needs, and collective, social development needs, and creates heightened motivation and confidence, which in turn generates commitment and reciprocity within systemic leadership development.

This effect was reinforced by the *symbolic victory* factor, where participants had their suitability for promotion further assured by successfully completing the programme, which was in turn marked by ceremony, pomp and circumstance. The sizeable ceremony signals that participants have met the prescribed standards expected for organisational leadership, and subsequently become part of a new team and social structure and network (this is also represented in the formal public recognition of their promotions – openly reported at the final ceremony). This supports systemic leadership development

across all three key aspects: collective synergy, organisational development and integration with social structures and processes.

Therefore, one must avoid limited opportunities for successive promotion, which only isolates the programme as merely a personal development experience, rather than a social capital development and systemic leadership development initiative.

4.14.5.4 Avoid diminutive amounts of mid-level leaders participating on programmes

The cross-case analysis indicates that programmes ought to avoid sending small aggregates of mid-level leadership representation on programmes, as only small amounts may have very limited effect on systemic leadership development. The lack of management representation going through the learning and development experience makes systemic leadership development all the more challenging, as it limits collective promulgation of key systemic factors like setting strategy, direction and alignments, and collectively promulgating social and organisational imperatives. The exclusive representation also potentially inhibits the ability to develop organisation-wide social awareness within mid-level leadership, where collective synergies and social structures are consequently insufficiently ingrained, and not distributed widely enough. In this sense, the development is isolated to individual convergences, rather than systemic representation.

The exclusivity view of participation may, in fact, propagate potential inhibitors like *egoistic development orientation* and *egoistic agenda*. This is because it undermines the collective orientation of the organisation and the role of dyadic leadership interaction in generating collective synergies and integrating social structures and processes. The developing leaders are left to situate the learning in isolated space-times within the organisation. This leaves the participants engaging with the development as personal career development, rather than aligning with wider social or organisational imperatives. Subsequently, this promotes local capital needs rather than social capital needs, to the detriment of nurturing SAEI perspective leadership and systemic leadership development.

Therefore, rather than isolate those selected participants from their fellow peers back in the organisation, programmes should endeavour to capture a critical mass of mid-level leadership representation in order than systemic leadership development occurs. Indeed, the *systemic inclusion and quantity* factor revealed such a critical-mass approach, where attendance is essentially mandatory for mid-level leaders, therefore capturing the vast majority of leadership roles for development, and where institutionalisation was evident.

The vast aggregation of leaders, coupled with significant quantities of time conducting the programme, has the potential to be strong catalysts for systemic leadership development. This was evident in the

responses of the participants of Case Study B, who described significant re-alignments of personal views of leadership towards organisational views, and where organisational needs overrode egoistic ones. This factor potentially also supports the drawing-in of participants into the wider organisation, by fostering systemic group cohesion and team building, and prescriptively setting direction and alignments with organisational development needs.

Indeed, programmes ought to avoid having small amounts of mid-level leaders participating on programmes, as this may have insignificant, or even negative, effects on systemic leadership development, as a broad representation of peerage is neglected from the learning and development, as well as impaired systemic alignments and development (Bolden, 2005).

The quantity of time spent on the programme also appeared to be a key factor in the efficacy of systemic leadership development, and this is consistent with the ten thousand hours proposition (Day, 2011), however no indication was forthcoming as to what the optimum quantity would be, beyond the obvious dictum: 'more is generally better'.

In summary, systemic leadership development might be more impactful by avoiding isolating certain factors of the programme. These four factors present significant challenges to achieving systemic development and must be fundamental considerations when evaluating leadership interventions. When considering what impact is intended and subsequently measured, programmes should consider thoroughly avoiding these factors, and in doing so, they potentially generate significant links to systemic leadership development, as shown in **Table 4.21**.

What	How (Avoid>)	Why (Potential impact on Systemic Leadership Development)
Avoid Isolationism	Avoid negligible linkages to real-world challenges	✓ Setting direction and alignments ✓ Forges and maintains commitments ✓ Social and organisational imperatives ✓ Feedback and challenge ✓ Integration with social and network systems ✓ Creates social awareness (across collective synergies, organisational development and social structures and processes)
	Avoid little social interaction with the wider organisation	✓ Encourages collective synergies (full definition) ✓ Supports organisational development {full definition) ✓ Links to social structures and processes (full definition)
	Avoid limited opportunities for successive promotion	✓ Supports social and organisational imperatives ✓ Forges and maintains commitments ✓ Builds trust, cooperation, goodwill and reciprocity ✓ Supports integration with social and network systems ✓ Sets direction and alignments
	Avoid diminutive amounts of mid-level leaders participating on programmes	✓ Generates social awareness across all factors of systemic leadership development ✓ forges and maintains commitments ✓ Demonstrates social and organisational imperatives ✓ Supports organisational development (full definition) ✓ Links to social structures and processes

Table 4.21 - Impact: Avoid Isolationism. Source: Author

Therefore, viewed against the literature review, the new differentiated perspectives generated through this research creates a deeper, richer appreciation for how greater impact individual and organisational might be achieved on systemic leadership development programmes. **Table 4.22** below summarises these additional perspectives.

	Theoretical perspectives	
Theme	**Extant Literature**	**Cross-case analysis**
Avoid negligible linkages to real-world challenges	The literature revealed that impact is primarily directed towards, and measured, at personal and individual levels, rather than relational and organisational. However, beyond harvesting participant satisfaction feedback and merely inferential anecdotal benefits, diminutive progress has been made in identifying effective methods on how to measure real-world impact of developmental interventions. This is likely due to reconciling how to correlate all the complex multifarious factors into reliable evaluative methods	It revealed that rather than isolating the learning experience, in a personal development space, programmes should focus on re-creating real-world simulations of effective organisational leadership, where appropriate behaviours are explicit and engendered. This allows the organisation to draw explicit linkages between individual behaviours and organisational development needs, like social imperatives and cultural development, as well as situating leadership with existing social structures and networks, and their explicit challenges

Theoretical perspectives (continued)		
Avoid little social interaction with the wider organisation	An area identified for further development in theoretical understanding is the impact of 'nesting' in context of leadership development interventions; i.e. examining the impact of individuals, nested within teams, nested within organisations, nested within countries etc. As already stated, little is appreciated of what impact occurs beyond the individual's learning experience and reflective recognition	The research revealed that by inadequately situating and integrating leadership development within wider organisational social contexts - and not prescriptively developing efficacious social interactions (particularly with direct successive leadership appointments) - the programme may have little impact beyond mere egoistic leader development. Instead, the social interaction of participants must be extended to include wider organisational interests and representations, so as to positively affect the creation of wider dyadic team synergies, awareness of organisational development needs and integration with extant social structures and processes. Importantly, greater social interaction with the wider organisation will increase social awareness across participants
Avoid limited opportunities for successive promotion	The literature suggests that personal development is a significant motivational factor for leaders conducting leadership development and that career advancement and greater leadership responsibilities are perceived as desirable outcomes of the acquired learning and development experience	It was revealed that organisations conducting leadership development must avoid providing limited opportunities for successive promotion; rather, ideally every participants should receive promotion upon successful completion. By not explicitly showing each and every participant 'what place' they had in the future of the organisation and how their acquired learning shapes that future, the programme potentially fails to move beyond merely connecting with egoistic needs and isolates itself as personal development experience, rather than a social capital development and systemic leadership development initiative
Avoid diminutive amounts of mid-level leaders participating on programmes	Extant literature is silent on an indicative percentage of leaders in an organisation should conduct leadership development and what an ideal 'critical mass' would represent in order to affect systemic leadership development	The research revealed that having a vast aggregation of leaders conduct the programme, coupled with significant quantities of time on it, has the potential to generate systemic leadership development; where significant socially constructed re-alignments occurs. This factor potentially supports the drawing-in of participants into the wider organisation, by fostering group cohesion and team building, and collectively setting direction and alignments with organisational development needs

Table 4.22 - Impact: Avoid Isolationism - Differentiated theoretical Perspectives. Source: Author

4.14.6 Values integration: *"Create Leaders with Heart"*

A cross-case analysis of Values integration factors was applied to the respective cases and validation study and the following key catalysts and inhibitors were critically compared (**Table 4.23).**

Element Five: Values integration			
Factors of Influence	**Case Study A**	**Case Study B**	**Validation Study**
Catalysts	▪ Safety: institutionalised behaviour	▪ Explicit integration & measurement ▪ Disciplinary code	▪ Tribal preservation
Inhibitors	▪ Paying lip service ▪ Ought-Is paradox		▪ Inauthenticity ▪ Merely process adherence

Table 4.23 - Values Integration: Cross-Case Factors of Influence. Source: Author

The cross-case analysis of the factors of influence revealed several important insights into how corporate values might be efficaciously integrated with systemic leadership development. These insights exposed certain key issues around relevancy, authenticity and whether corporate values were being successfully promulgated on programmes. Notably, it was evident that values were a neglected feature of the energy sector case study (this was supported by the Validation Study findings) and little, if any time at all, was being applied to developing leaders' values, which were congruent with corporate values and expected organisational leadership behaviours. This inattention has an obvious association with Lewis' (1943) view of the dangers of failing to nurture men and women with 'chests' (i.e. heart, not just head), where others have little reason to *"expect from them virtue and enterprise" (*p.35). If the correspondence of watering a potted plant is analogous with developing leaders with heart, then effective systemic leadership development must consider ways to develop leadership values through endeavouring to *create leaders with heart*.

The cross-case analysis revealed a three-part theoretical solution for integrating values efficaciously within systemic leadership development, through creating:

- Values enforcement
- Explicit integration
- Emotional Connectivity

These factors were compelling in the cross-case analysis and provide new perspectives.

4.14.6.1 Create values enforcement

Firstly, the cross-case analysis revealed that when values were enforced – in the sense that disciplinary techniques were used to support their adoption and institutionalisation – the promulgation of the value-system was efficacious. This was seen in the *safety: institutionalised behaviour* and *disciplinary code* factors of influence.

Ironically, although safety leadership was not specifically addressed on the energy sector programme, the safety value was significantly promulgated elsewhere within the wider organisation, and brought *into* the learning experience by participants. This was manifest in the testimonials of those energy participants, who would reference safety in the values discussion with the researcher, despite the fact it was not formally covered, or integrated, at all on the programme. This clear adoption and application among participating leaders, its strong contextual links and levels of collective and social responsibility is congruent with systemic leadership development. Indeed, safety leadership demonstrates an effective systemic leadership development approach across collective synergies - with forging and maintaining commitments and engendering trust, cooperation, goodwill and reciprocity - also with efficacious organisational development - aligned to social and organisational imperatives (i.e. 'safe operations') – and cooperation and coordination across organisational social networks, where clear consistency and commitment were extant. A recurring explanation for why safety leadership was so important was the disciplinary consequences associated with non-adherence. Participants made reference to the consequences of failing to practice safety - i.e. 'just about the only thing you can get sacked for' - and that daily minor punitive disciplinary action supported compliance: i.e. yellow cards, and verbal warnings, issued to staff for unsafe practices (such as not holding the handrail on stairs or failing to have lids on disposable coffee cups), or 'stop cards' halting operations immediately if there is any risk to safety perceived. These disciplinary techniques enforced the demonstration of safety leadership behaviours.

Values enforcement was extant in the military sector programme, as seen in the *disciplinary code* factor, and provided a much more holistic and integrated approach to developing leadership values; one that captured all six corporate values within its pedagogy, rather than isolated, incidental links, as seen on the energy programme. The enforcement approach, applying disciplinary techniques, created an expressively strong social awareness across the participants as to the organisational and social imperatives of corporate values; and recognition that adoption and internalisation is mandatory. Indeed, a former programme director considered self-interest and a lack of social conscience as his biggest leadership development challenges on the programme (Howard, 2015). Subsequently, disciplinary techniques are seen as the backbone of enforcing organisational values in leadership

development. The type of disciplinary techniques utilised were both major and minor punitive actions: from dismissal from the programme for significant contraventions of the values, such as dishonesty, cheating and poor attendance; to minor sanctions for issues such as destructive personal conduct in group discussions and avoidance of duties and responsibilities, which might involve allocation of extra duties, repeating an action or activity, or removal of privileges for a period of time. Despite philosophical reservations of an enforcement approach, and its discomfiting disciplinary techniques, there were clear benefits for systemic leadership development, as the high levels of scrutiny and enforcement, with regards to values-demonstration and –development, reflects a wider organisational commitment to giving strong direction and demanding individual alignment with social and organisational imperatives. This systemic consistency supports integration of the programme with wider organisational social and network systems, where the corporate values are also being scrutinised and enforced using a strict disciplinary code: i.e. one can be punished for the same values-offences back in the workplace. This shows a collective orientation at the highest level: across the whole organisation.

In essence, if the exaltation of the social requires a diminution of the individual, values enforcement expedites this paradigm shift.

4.14.6.2 Create explicit values integration

Secondly, it was evident from the cross-case analysis that values should be explicitly integrated into the programme through simulations and demonstrations of value-based leadership; and how they should deal with real world challenges. The values should be linked to certain behaviours and rehearse how they should be performed in practice. This allows both clarity for the participants, with regards to learning and development expectations, also with programme management, with regards to measurement of learning and development. The systemic benefits of this explicit integration were clear in the *values integration* and *explicit integration and measurement* factors of influence.

The analysis showed that despite the significance of corporate values in directing collective leadership behaviours, in reality, unless they are sufficiently integrated into the leadership development programme, or even complimentary interventions and corporate initiatives (and then brought into the programme), the values are potentially irrelevant or unconnected with daily working experiences of leaders. This was clearly the case in the energy sector programme and supported by validation study observations; where the only corporate value of daily appropriation was ‘safety’; the rest were either regarded as ‘taglines intended for shareholder marketing’ or even just simply unidentifiable.

Therefore, by integrating values into the programme in a meaningful and prescriptive way, this leads to the creation of social awareness across all aspects of systemic leadership development, as well as potentially forging collective behavioural commitments and systemic cultural development. Also, by explicitly integrating and reinforcing corporate values, the programme will negate contingencies in individual leaders' egoistic development needs and negative operational leadership practices, such as toxic leadership.

By explicitly embedding corporate values into almost every activity of the programme, across design and delivery, no participant may evade their development, and all might be scrutinised with regards to their appropriation. An explicit integration of corporate values into the programme also links leadership to wider organisational needs and 'golden threads', such as strategy, HR policies and procurement.

4.14.6.3 Create emotional connectivity

Thirdly, the values must have emotional connectivity with participants own belief-systems and personal values in order to affect change. It is not sufficient to merely present organisational values as a creed system or management framework and expect agnostic acquiescence, rather like an abstract religious ritual; but rather regard them as beliefs, promulgated by means of pathos persuasive acquiescence, where participants feel the values connect with the heart, through authenticity and integrity. They should be beliefs supported by personal experience. The corporate 'world' should be a better-off place by their appropriation. This emotional connectivity and authenticity potentially negates the inhibitive factor *ought-is paradox* seen in Case Study A, by making the values real and relevant.

Furthermore, values should be fundamentally promulgated as effective behaviours not merely processes. The potential inhibitor *merely process adherence* revealed that propagating values via a process management approach has the potential to neglect systemic leadership development needs. By reducing values to merely enforced processes and procedures, adherence to certain organisational values, such as safety, may neglect key systemic elements like collective synergies, social awareness and culture development; as management techniques appropriate values adherence, rather than effective transformational and follower-orientated leadership approaches (Burns, 1978; Bass, 1985; Greenleaf, 1970). Indeed, purely promulgating values through process adherence potentially neglects key social organisational leadership considerations, like morally-based idealised influence and SAEI orientated leadership practice; here values shift from the leadership domain into the management domain, and subsequently, appear stripped of some of their humanity and anthropocentric nature.

As stated above, emotional authenticity and connectivity is potentially vital for creating leaders with heart, as the *inauthenticity* factor of influence revealed that when organisational values lacked authentic linkages with real-world collective relational interactions, they were seen as little more than abstract corporate propaganda. When viewed as such, the values appeared to have little positive impact on social capital development within the organisation, rather than being a bedrock of developing efficacious multilateral SAEI leadership and generating collective synergies and cultural development that exemplifies personified corporate values. Therefore, it is vital that value promulgation should be done using normative leadership principles to reinforce authenticity of values.

Finally, a potentially potent approach to generating social capital and systemic leadership development, through emotional connectivity, might be seen in the *tribal preservation* factor, which revealed that when values are utilised as a means of preservation of both tribal members and the tribal system, they are socially constructed and SAEI orientated. This tribal preservation factor manifests as a socially embedded honour-bound code of conduct for social members, where they collectively regulate team and organisational accountability and loyalty, and a sense of exclusivity and solidarity through programme experiences which strengths tribal identity. This tribal identity and preservation supports social capital preservation and development and is important for long term alignments as they are systemically embedded in social awareness and organisational culture.

Thus, by creating leaders with heart through applying these three principles of (1) values enforcement, (2) explicit integration, and (3) emotional connectivity, organisations can create strong potential links to systemic leadership development, as shown in **Table 4.24** below.

What	**How** **(Create>)**	**Why** **(Potential impact on Systemic Leadership Development)**
Create Leaders with Heart	Create values enforcement	✓ Sets direction and alignments ✓ Forges and maintains commitments ✓ Builds trust, cooperation, goodwill and reciprocity ✓ Creates high quality feedback and challenge ✓ Creates social awareness (across collective synergies, organisational development and social structures and processes) ✓ Cultural development
	Create explicit values integration	✓ Forges and maintains commitments ✓ Creates high quality feedback and challenge ✓ Supports organisational development {full definition) ✓ Links to social structures and processes (full definition)
	Create emotional connectivity	✓ Forges and maintains commitments ✓ Builds trust, cooperation, goodwill and reciprocity ✓ Creates high quality feedback and challenge ✓ Fostering social cooperation, coordination and networks

Table 4.24 - Values Integration: Create Leaders with Heart. Source: Author

Finally, viewed against the literature review, the new differentiated perspectives generated through this research creates a deeper, richer appreciation for how values can be more efficaciously integrated with systemic leadership development.

Table 4.25 below summarises these additional perspectives.

	Theoretical perspectives	
Theme	**Extant Literature**	**Cross-case analysis**
Create values enforcement	Recognition that within UK/US militaries values are integrated efficaciously into leadership development	Identified a key factor in the effective promulgation and development of military values: through enforcement
	Sparse reference to how values might be enforced in organisations through systemic leadership development programmes, beyond aspirational by-products of transformational theory approaches	Provides means to support the internalisation and application of organisational values in leadership behaviours
Create explicit values integration	Extant literature views corporate values as an extrinsic influential factor, inferentially feeding into the learning and development environment, rather than the converse.	Clear linkages between the use of simulations, with desirable values explicitly integrated into their design and purpose, and systemic leadership development were uncovered in the analysis
	Very little direct acknowledgement is made as to the importance or utility of explicitly simulating in the learning environment leadership scenarios that nurture key organisational values and to assess leaders' performances within these explicit and deliberate simulations	Provides a perspective of how organisational leadership values can be nurtured within the learning and development environment and transplanted outwards into the wider organisation
Create emotional connectivity	Acknowledgement is made that only pervasive leadership development programmes, will affect wider organisational culture, performance and values-based leadership Socially conducive and morally robust value-based leadership development approaches are more likely to generate positive effects on the wider organisation	A systemic leadership development perspective reveals how emotional connectivity and authenticity between the values and participants is essential for 'deep-seating' corporate values - where 'men with chests' are nurtured - and has the sort of significant impact required to puncture participants' Lifestream Model (Avolio, 2005) and change individual belief-systems and values towards organisational values systems

Table 4.25 - Values Integration: Create Leaders with Heart - Differentiated theoretical Perspectives. Source: Author

In summary, this chapter discussed the findings of the case studies and validation study, utilising the Fi model for analysis, and also conducted a comparative analysis in the cross-case analysis and discussion. These analyses generated some rich and deeper insights into how the key themes of the

research influence the generation of systemic leadership development, and revealed some potential theoretical solutions to the research problem.

This chapter dealt specifically with answering both research questions for the study.

The next and final chapter will summarise the key conclusions, implications and recommendations of the research.

CHAPTER FIVE – CONCLUSIONS, IMPLICATIONS AND RECOMMENDATIONS

CONCLUSIONS, IMPLICATIONS AND RECOMMENDATIONS

5.1 Introduction to the chapter

This study has presented an empirically substantiated thematic analysis of systemic leadership development, by identifying which key factors of influence are at play in generating efficacious development. It has focused on the research problem, aims and objectives outlined in Chapter One, by essentially focusing on the cardinal themes: (1) how effective is the training delivery; (2) is contextualisation integrated into the learning experience; (3) how are participants' performances measured and enhanced; (4) what is the individual and organisational impact of the interventions; and (5) how are corporate values integrated into developmental experience. And also by understanding extraneous organisational leadership dynamics and influences. Critical data analysis from two case studies and a validation study revealed a portfolio of theoretical solutions for generating more efficacious systemic leadership development. This final chapter discusses contributions to knowledge in the field of leadership development; significant implications and limitations of the research; and, conclusions and recommendations are offered for pragmatic application in future leadership development interventions.

5.2 Conclusions, Implications and Recommendations

5.2.1 Contributions to knowledge

The research set out to critically examine current systemic views of leadership development, looking for key factors of influence in generating efficacious interventions. Methodologically, the approach provided a rich, deep social constructivist landscape, which produced a series of theoretical solutions across the targeted cardinal analytical themes.

The research revealed that within the energy sector case study little emphasis is being put on social capital generating leadership development, and is almost entirely orientated towards local, human capital development. This egoistic learning agenda demonstrably promulgates a lack of systemic leadership development across the broad definition: generating greater emphases on collective relational development, that is long term, and creating collective synergies, organisational development and social structures and processes. On the contrary, the military case study revealed

strong systemic linkages and attestable positive factors of influence. These differences were supported and expanded by the Validation Study findings.

The study also highlighted a significant dearth of research and literature relating to promoting systemic leadership development, and therefore makes a contribution towards promoting other researchers to direct their future research commitments towards systemic inquiries.

The contributions to knowledge generated by this study have been based not only upon the empirical findings, but also on correlations with extant theories and hypotheses, identified in the literature review and in the research discussion, providing an overall deeper and enhanced understanding of systemic leadership development, particularly within the two case studies' sectors.

There is a movement to commit to developing holistic models of leadership development that are social-constructivist in orientation (Grant & Jackson, 2010; Jones, 2011), in an attempt to reconcile some of the apparently paradoxical theories of leadership development, this research contributes to that endeavour, through committing to understand and improve the efficacy of systemic development that is social capital and constructivist in nature. The social constructivist view of this research allowed the perceived reality of each leaders' experience of leadership development to be explored and synthesised in a constructed view of reality, where extrapolations may be made as to factors of influence. A richness and depth of data is gained by taking this approach. Also by taking a qualitative approach, the researcher has been able to establish theories that emerge from the narratives of the respondents, and by using comparative analysis across the socially constructed accounts of the case studies, and corroborations of Validation Study narratives, as to leaders' sense-making and value judgements of their developmental experiences.

5.2.1.1 Theoretical solutions for generating efficacious systemic leadership development

The research has been successful in producing theoretical solutions in a synthesised thematic model of the key factors of influence in efficacious systemic leadership development. The model postulations are each causally linked to the target systemic definition of generating a collective and relational connectivity between leaders and their organisations, and the positive influence interventions can have on collective synergies, organisational development and reinforcing social structures and processes. This orientation provides a valuable contribution to knowledge, and should provoke further discussion and awareness as to the need to draw social capital, organisational-level factors into theoretic and pragmatic intervention design and delivery. Indeed, driving egoistic focus and self-driven learning in leadership development may in fact isolate leaders from their organisational contexts and promote disenfranchisement and disunity, rather than building collective capability, social awareness

and solidarity in leadership. This orientation may actually be necessary and sufficient if any utilised definition of leadership requires *team* as a fundamental tenet, and might even potentially allude to a cause for the acknowledged breakdown in quality of organisational leadership and leadership development interventions.

This research has revealed that in order for leadership development to be truly collective and relationally orientated, as advocated by systemic and SAEI orientated perspectives, organisations must elevate in importance their contextual needs and appropriation requirements, as well as its social capital development needs, within programmes. Subsequently, the research identified a series of theoretical solutions across the cardinal themes of analysis. These theoretical solutions make significant contributions for how systemic leadership development programmes might be more efficacious. The extrapolation and recommendations that fall out of these solutions succeed in promoting a paradigm shift from human capital to social capital development, individual to group needs, from self-directed, egoistic learning objectives to prescribed organisational objectives.

Indeed, the creation of theoretical solutions with regards to generating efficacious systemic leadership development across the cardinal themes of developmental interventions and against the systemic leadership development working definition, was the most significant contribution to knowledge made by this research. Taken as a whole, the thematic model provides novel insight into the challenges of delivering systemic developmental interventions and reveals important areas for adoption in positive future theoretical and practical discourse.

The theoretical solutions identified in the cross-case analysis and findings discussion represent direct answers to the research questions outlined in Chapter One. This is outline in **Table 5.1**. The table also demonstrates how Research Questions One and Two correlate across the factors of influence and theoretical solutions.

Themes	Research Question One: Factors of Influence		Research Question Two: Theoretical Solutions
Organisational Leadership	• Extrinsic anthroprocentric focus • Commitment • Sovereign selection • Social-collective orientation • Transformational leadership • Value-behaviours synonym	• Explicitly progressive • Enforcing social values • Egoistic leadership focus • Strategic disconnect • Operational myopia • Behavioural ambiguity • Selection criteria • Inflexibility • Technical-results driven	• Promote social-collective view • Promote external anthropocentric focus • Promote commitment to good leadership practices • Promote transformational leadership behaviours • Promote enforced social values • Promote values-behavioural synonymy
Element One: Delivery	• Senior leadership experience • Credibility • Role modelling • Links to context • Authority • War-captain perception • Cradle-grave design • Mentor-coach conflation • Systemic-group experience • Authority and connectivity	• Rushed interaction • No authority • No role modelling • No obvious leadership experience • No link to context • No commitment • No structured interaction • No outcomes identified • Poor quality • Lack of credulity and realism	• Select more senior relevant experience • Select mentor-coach synthesis • Select formal authority figure • Select trial-by-fire credibility
Element Two: Contextualisation	• Corporate synergy focus • Scenario-based • Pervading context • Context paradox • Ungrounded context	• Limited future-context link • Immediacy bias • Perceived negativity • Real-world disconnect	• Make context the backbone of programme design • Make assessment of participants' performances against context • Make direct connectivity with next leadership appointment
Element Three: Performance	• 360 degree effectiveness • Reflexive commitment • Explicit meritocracy • Continuous challenge and scrutiny • Great discomfort and challenge • Crash test environment	• Unstructured feedback • Feedback illusion • Challenge and remediation • Discomfort and ostricisation • Avoiding personal criticism	• Challenge with systematic social scrutiny, and • Challenge by destroying the comfort zone
Element Four: Impact	• Confidence and engagement • Immediate successive promotion • Symbolic victory • Immersion • Systemic inclusion & quantity • Isolationism	• Reality disconnect • Egoistic expectations • Gender bias • Conformity resistance • Egoistic agenda • Values-inauthenticity-impact • Social disconnect	• Avoid negligible linkages to real-world challenges • Avoid little social interaction with the wider organisation • Avoid limited opportunities for successive promotion, and • Avoid diminutive amounts of mid-level leaders participating on programmes
Element Four Values	• Safety: institutionalised behaviour • Explicit integration & measurement • Disciplinary code	• Tribal preservation • Paying lip service • Ought-Is paradox • Inauthenticity • Merely process adherence	• Create values enforcement • Create explicit integration • Create emotional Connectivity

Table 5.1 - Synthesising Research Questions, Themes, Factors and Theoretical Solutions. Source: Author

The theoretical solutions will now be outlined and presented as a synthesised thematic model for generating systemic leadership development:

5.2.1.2 Theoretical Solution - Organisational Leadership: Promote People-Centrality

It is proposed by promoting people-centrality across organisational leadership, through the promotion of social-collective views of leadership, where team needs come before individuals and where performance inter-accountability exists amongst team members, and also by promoting an external anthropocentric focus and commitment to good leadership practices, leaders' behaviours can enhance client, staff and partners, within a SAEI orientated view, and enforce greater commitments to demonstrating good transformational leadership behaviours and practices. Here values and behaviours are synonymised into practicably being one in the same thing, with demonstrable and measured behaviours enforcing organisational leadership values.

The promotion of people-centrality will draw the emphasis away from predominantly tech-centric competencies and human capital development, towards a social capital development view that supports the creation of systemic leadership development. Indeed, when people-centric competencies, like emotional intelligence and values-based leadership were core to organisational leadership, social interaction emerged as the metric for assessing leadership performance, rather than technical knowledge; and group-needs, supported by a strong collectively-endorsed moral component, emerged as the paramount priority for organisational leadership.

This theoretical solution and its constituent sub-parts are clearly presented in **Figure 5.1**.

5.2.1.3 Theoretical Solution - Delivery: Select Superhero Trainers

It is proposed that selecting 'superhero' trainers has a positive effect on generating efficacious systemic leadership development. What institutes 'superhero' was identified by four constituent features.

It was revealed that trainers who had more senior and contextually relevant experience than the participants received increased positive perception and enhanced coaching effectiveness. Those trainers could provide rich feedback and challenge, which is contextually directly linked to the needs of the participants' future leadership roles. It was felt that they were also more strategic and could subtly identify important themes for coaching participants within the organisational context. They were also respected as having done it before and viewed as being successful; and that they had progressed and subsequently know what it takes to practice effective leadership.

There was clear evidential systemic value in a functional synthesis of having the leadership trainer synthesise both Mentor-Coach in one role. The mentor role provides an archetype of what is expected, indeed, representing organisational needs, and should be invested with the necessary authority to challenge and direct participants through their development; whereas, the coach role utilises a sophisticated pedagogical approach to engendering a reflexive, engaged and empowered learning experience; one that utilises transformational leadership and emotional intelligence to inspire and engage participants in an authentic leadership mode. The mentor role is trainer-centric, the coach role is participant-centric: both are essential. Thus, within a systemic approach, a leadership trainer should assume a mentor role, using coaching methods.

It was shown that by utilising trainers who embody formal authority figures - as more senior leaders within the same organisation - this leads to greater accountability and motivation across both trainer and participants, in achieving both local (human) and systemic (social) leadership development; as the trainers were considered as empowered representatives of the organisation, not merely peers or external, unaccountable consultants.

When leadership trainers have formal authority, this generates increased self-awareness of their own training responsibilities and increased trainer performance, and scrutiny, as well as maintaining and representing the wider interests of the organisation. This awareness of responsibility was then manifest in the scrutiny and assessment of participants' performances, which, in turn, was respected and accepted by participants. Thus, as formal authority figures, trainers act as formal, empowered custodians of systemic leadership needs and expectations.

It was revealed that having a strong 'superhero' role-model trainer produced a positive transformational idealised influence; therefore, utilising trainers who have proven themselves in successful frontline leadership for the organisation, in a widely-recognisable and incontestable fashion, produces a positive engagement with participants. It also ensures trainers appreciate relevant contextual applications of leadership and can provide explicit real-world linkages. Also, having successful, battle-hardened, frontline leaders as trainers - those that have successfully led in the most challenging of environments - mitigates the explicit inhibition of lack of credibility.

This theoretical solution and its constituent sub-parts are clearly presented in **Figure 5.1**.

5.2.1.4 Theoretical Solution - Contextualisation: Make Context King

It is proposed that to achieve systemic leadership development the paramountcy of context within development experiences must be assumed. Unlike human capital development, where context did not appear essential for development, within social capital development, context provided necessary

linkages to social nesting of organisational leadership. The inferential systemic benefits of correctly applied context were explicit and extensive in the analysis. Furthermore, by making context 'king' through applying three key principles of: making context the backbone of programme design, assessing participants' performances against context, and direct connectivity with the next leadership appointment, organisations can create strong potential links to systemic leadership development.

Firstly, purposefully committing to 'golden thread' application of context throughout all aspects of the programme - within simulated real-world team environments (i.e. mirroring organisational team dynamics), replicated hierarchies, tasks and responsibilities, routine and scrutiny - results in participants gaining intimate familiarity with organisational systemic leadership needs. Furthermore, in a fully contextualised learning environment, individualism and egoistic motivations were openly challenged and remediated.

Secondly, it is essential to assess participants' performances whilst on the programme against organisational expectations of leadership within given contextual simulations. This is imperative as to develop desirable leadership styles and align behaviours with environmental systemic needs and expectations. Heightened awareness of organisational needs - through performance scrutiny - was shared collectively by the programme cohort, and resulted in collective shifts in behaviours.

Lastly, by having direct connectivity with the next leadership appointment, through contextualised content and successive assured promotion, the programme generates tangible organisational benefits, such as satisfying immediate organisational development imperatives (e.g. succession needs and talent management), team building across a peerage of leaders, and achieving immediate integration with relevant social and network systems.

This theoretical solution and its constituent sub-parts are clearly presented in **Figure 5.1**.

5.2.1.5 Theoretical Solution - Performance: Challenge Pascal's Problem

It is proposed that a potential theoretical solution for how developmental interventions might challenge Pascal's Problem in systemic leadership development programmes; i.e. the inclination of participants to avoid uncomfortable critique and focus learnings on personal desires, confining performance improvement to areas of personal comfort and motivation, not potentially personally-challenging organisational leadership needs. The theoretical solution focuses on systemic organisational factors, particularly environmental and social dynamics when assessing performance, through challenging with systematic social scrutiny and challenge by destroying the comfort zone.

It was revealed that scrutiny of performance is most efficacious if there is a clear criterion, which contains direct linkages to organisational and social development needs, against which to measure individuals' performance.

It is essential that performance scrutiny must be fair, transparent and consistent across all participants, with everyone experiencing the same type, and degree, of individual performance scrutiny against the systemic criterion. It should also be a social critique, open to the engagement and observations of others, through 360 multi-rater peer feedback, as well as from training staff. This social scrutiny approach should be systematic (i.e. when, where, how, who and what) for consistency and replicability; so as to counteract inhibition, preferential treatment, biases and discrimination, and to demonstrate fairness, predictability and commitment.

Rather than assuming that efficacious systemic leadership development is generated in safe learning environments, it is proposed that by destroying individuals' comfort zones, through robustly challenging their performances, even in an unsettling manner, by continuous critical observation and challenging feedback, through enforcing the development of defined desirable leadership behaviours and skills, this will potentially lead more efficaciously to systemic leadership development, as organisational needs and standards are demonstrably elevated above egoistic needs.

This theoretical solution and its constituent sub-parts are clearly presented in **Figure 5.1**.

5.2.1.6 Theoretical Solution - Impact: Avoid Isolationism

It is proposed a theoretical solution for generating efficacious systemic leadership development is found in avoiding the isolation of certain factors of the programme, by considering ways to integrate and inter-connect these key elements. When isolated, those key factors evidentially had a direct negative impact on systemic definitional aspects, therefore by avoiding negligible linkages to real-world challenges and avoiding little social interaction with the wider organisation, as well as avoiding limited opportunities for successive promotion and avoiding diminutive amounts of mid-level leaders participating on programmes, there is greater prospect of generating efficacious systemic leadership development.

The solution proposes that rather than isolating the learning experience, in a personal development space, with negligible linkages to real-world challenges, programmes should focus on re-creating real-world simulations of effective organisational leadership, where appropriate behaviours are explicit and engendered. This allows the organisation to draw explicit linkages between individual behaviours and organisational development needs, like social imperatives and cultural development, as well as situating leadership with existing social structures and networks, and their explicit challenges.

Furthermore, by inadequately situating and integrating leadership development within wider organisational social contexts – i.e. little social interaction with the wider organisation - and not prescriptively developing efficacious social interactions (particularly with direct successive leadership appointments) - the programme may have little impact beyond mere egoistic leader development. Instead, the social interaction of participants must be extended to include wider organisational interests and representations, so as to positively affect the creation of wider dyadic team synergies, awareness of organisational development needs and integration with extant social structures and processes. Importantly, greater social interaction with the wider organisation will increase social awareness across participants.

Systemic leadership development interventions must avoid providing limited opportunities for successive promotion; rather, ideally every participant should receive promotion upon successful completion. By not explicitly showing each and every participant 'what place' they have in the future of the organisation and how their acquired learning shapes that future, the programme potentially fails to move beyond merely connecting with egoistic needs and isolates itself as personal development experience, rather than a social capital development and systemic leadership development initiative, where organisational development needs are furthered and social systems and networks advanced.

Lastly, having a significant aggregation of organisational leaders conduct the programme, coupled with significant quantities of time on it, has the potential to generate systemic leadership development; where significant social systems and network re-alignments occurs; along with socially constructed notions of effective organisational leadership. This aspect also potentially supports the drawing-in of participants into the wider organisation, by fostering group cohesion and team building, and collectively setting direction and alignments with organisational development needs.

This theoretical solution and its constituent sub-parts are clearly presented in **Figure 5.1**.

5.2.1.7 Theoretical Solution - Values: Create Leaders with Heart

It is proposed that in order for systemic leadership development to develop leaders' values, which are congruent with corporate values, and which generate certain expected and necessary organisational leadership behaviours, there must be a commitment to creating leaders with heart. Creating leaders with heart, through systemic leadership development interventions, might be achieved through applying three principles of values enforcement, explicit integration, and emotional connectivity.

Firstly, a key factor in the effective promulgation and development of corporate values is through enforcement. This provides means to support the internalisation and application of organisational

values in leadership behaviours. Developing leaders are, in a sense, forced into maintaining commitment and cooperation with corporate values, by use of disciplinary techniques. This creates an expressively strong social awareness across participants as to the organisation and social imperatives of corporate values.

Secondly, clear linkages between the use of simulations and desirable values - explicitly integrated into the design and purpose of simulations - and systemic leadership development, provides a potential solution for how organisational leadership values can be nurtured within the learning and development environment and transplanted outwards into the wider organisation. Corporate values should be explicitly integrated into developmental activities; mirroring the contextual and environmental challenges back in the real-world of organisation life - challenges such as bribery and corruption, and dishonesty.

Finally, an emotional connectivity, and indeed authenticity, between the values and participants is essential for deep-seating corporate values - where leaders with heart are nurtured. This deep seating, across the participants, generates a socially embedded honour-bound code of conduct for social members, where they collectively regulate team and organisational accountability and loyalty, and a sense of exclusivity and solidarity through programme experiences which strengths tribal identity. This tribal identity and preservation supports social capital preservation and development and is important for long term alignments, as they are systemically embedded in social awareness and organisational culture.

This theoretical solution and its constituent sub-parts are clearly presented in **Figure 5.1**.

The synthesised thematic model, showing all of the above theoretical solutions, is aimed at the praxis audience for real-world utilisation and adoption; e.g. the Harvard Business Review audience. All the theoretical solutions and their constituent sub-parts are clearly displayed below in **Figure 5.1**. This model demonstrates how leadership development programmes can influence the generation of systemic leadership development.

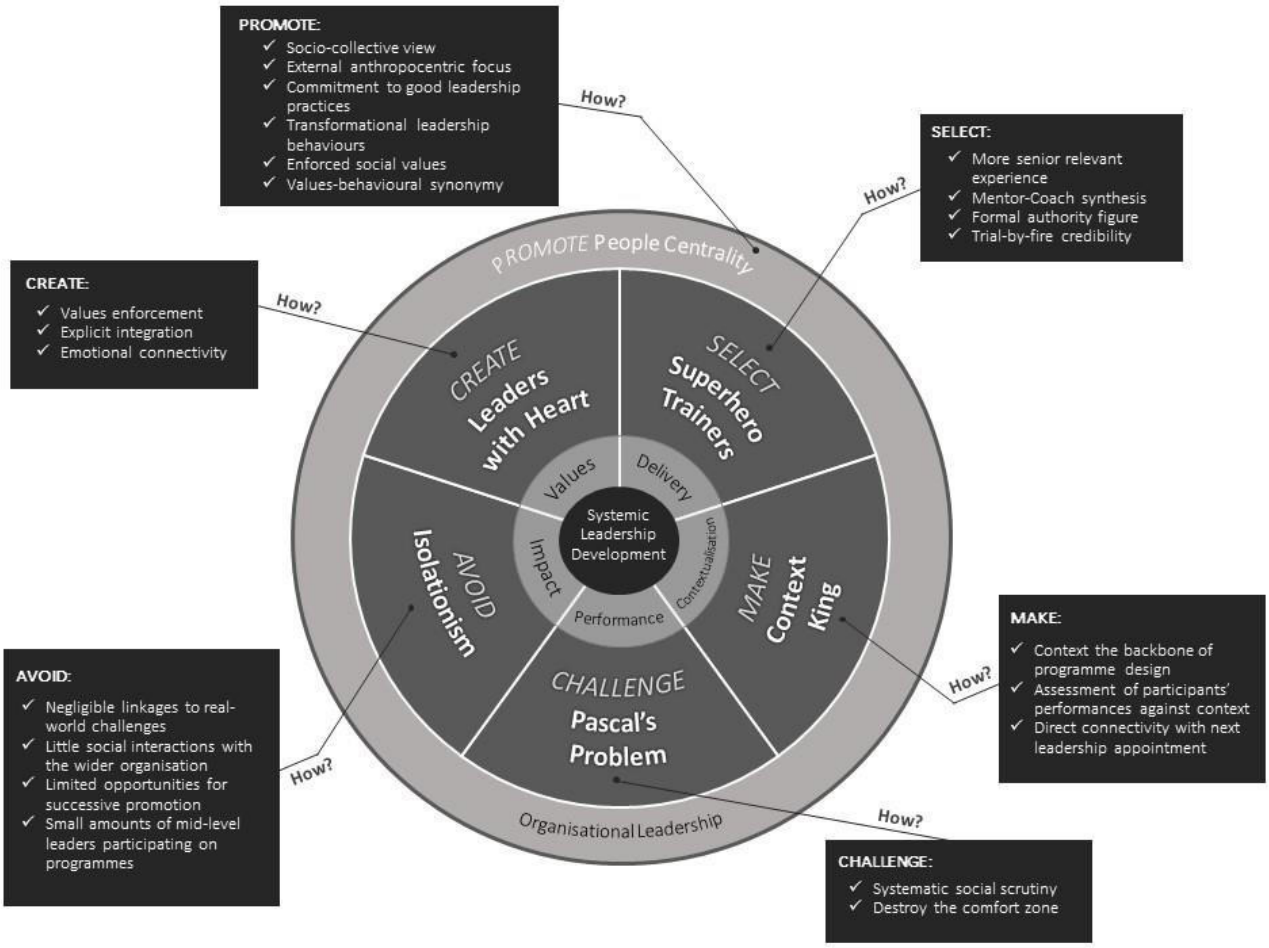

Figure 5.1 - Synthesised Thematic Model with Theoretical Solutions for Generating Systemic Leadership Development. Source: Author

The synthesised thematic model demonstrates how within the cardinal themes there are potential alleviatory solutions to theoretical challenges and issues identified in the literature review and data analysis. However, the model should not be viewed as being static and absolute, but should be challenged and amended as richer, deeper insights are revealed by subsequent research.

5.2.2 Implications for practice

This research can make various contributions to the field of leadership development practice. Principally, the synthesised thematic model represents potential solutions for enhancing the efficacy of systemic leadership development. The value of promulgating and enhancing a systemic view is that it brings organisational growth firmly into the developmental equation, where leadership contributes to social capital development within a distinct group identity (the organisation) and promulgates organisational leadership behaviours that are SAEI orientated in their impact. The 'organisation' replaces 'individual' at the top of on the developmental needs hierarchy, and provides remediation opportunities for mitigating Pascal's egotism problem or ambiguity around developmental objectives

and outcomes. It also promotes an approach to leadership development which aims to draw participants closer and deeper into organisational social constructs and potentially mitigates retention issues and diminishing brand-loyalty.

The synthesised thematic model presented is praxis-orientated in its language and applicability, so that expert practitioners might uplift the theoretic solutions and consider their implications when reviewing and adapting existing leadership development programmes. The findings should encourage programme designers and deliverers to commit to a systemic approach that includes wider organisational development needs.

5.2.3 Research limitations

There were certain limitations and delineation within the research.

Firstly, the research did not address ethnographic factors. For example, the case studies were conducted in two organisations with programmes based in the UK, and did not consider variations based on differing ethno-geographic cultures, like Scandinavian, Japanese or African; which are respectively quite different with regards to leadership styles and behaviours (Hofstede, 1991). Indeed, participants were predominantly of British, or European, ethnicity. Given that different cultures can produce different narratives and socially-constructed meaning (Hofstede, 1991; Tjosvold et al., 2007; Ferraro, 2010), applying the research methodology to varying cultural contexts may generate different factors of influence and leadership phenomena. For example, analysing the energy and military sectors of Scandinavian countries, where social capital views of leadership are perhaps more prevalent (Espedal et al., 2013), may reveal alternative hypotheses. Equally, not all militaries of the world are as sophisticated and led the same, and a Western first-world military might represent a significant difference, to say a West African one.

Secondly, this research represents a snapshot in the ongoing lifecycle of the respective case study programmes, and does not address dynamic factors - such as, the interviewed participants' learnings measured across the timespan of the developmental experience, changes in the design or delivery of the developmental interventions, contingent quality of the interviewed participants versus previous cohorts, and quality of the leadership trainers and mentors over time. As the research considered the case studies from a static point, it does not address wider organisational change, and the affect it may have on respondents' sense making processes through the change. Although it should be noted that these factors were potentially mitigated, to a degree, by the validation study, which represented a dynamic view 'outside' of the case studies snapshots.

Thirdly, the research did not address the influence of contingent macro-economic factors beyond the programme and organisations. External contextual factors, for the energy sector, such as commodity price volatility, fluctuating supplier and operating costs, regional political volatility, environmental disasters and variable access to workforce talent, will vary and have an impact on organisational change content (Pettigrew, 1987), as well as leadership development programme content. Similarly, military external contextual factors, such as variations in the size of the military, national employment rates, changing public opinion, media scrutiny and legal actions, all create an inherent contingency across some key factors in replicability and generalisability of the findings.

Finally, systemic linkages to other business functions, such as talent management, succession planning and wider management development interventions, within the case study organisations, were not addressed. These functions will have causal relationships with organisational learning and development initiatives, including leadership development, and it is assumed that a wider systemic approach within organisations, across functions, with greater alignments, generating systemic factors, like collective synergies, organisational development and reinforcing extant social networks and systems, may generate greater systemic efficacy on leadership development programmes.

5.2.4 Implications for future research

This research successfully identified key factors of influence in generating systemic leadership development, and in doing so highlighted six potential theoretical solutions. These theoretical solutions represent the corpus of future research; principally through publishing the thesis findings, both as a monograph and as a peer reviewed article for an academic journal.

Further research should look at an ethnographic application of the research strategy, for example, Middle-East, Far-East and Africa. This may reveal greater insights as to causal relationships between leadership development and social capital development, and provide greater insights and breadth of understanding and application of the systemic leadership development construct, in a global context. Therefore, extending its applicability and relevance to a broader array of audiences and researchers.

Similarly, a longitudinal study of systemic leadership development case studies might generate greater understanding of how organisational change and organisational leadership might better align, in order that leaders are developed in the most efficacious ways, for delivering successfully the expected change and organisation capability-building. A longitudinal study would facilitate analyses at individual participant levels, as well as organisational levels, mapping learning journeys, and identifying key ‘life events’ that trigger efficacious leadership development (Avolio, 2005).

Further research should be conducted to test the theoretical solutions for systemic leadership development, by conducting further case studies or by utilising alternative research methodologies, such as survey questionnaires and experimental methods, to scrutinise and expand upon the postulations.

Finally, through the researcher engaging with industry, for example, the energy sector, through applied research, in applying the theoretical solutions and the systemic leadership development approach to their developmental programmes, and subsequently reviewing and analysing change, this thesis may generate the sort of praxis-orientation and application that is desired of its contribution.

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APPENDIX A – RESEARCHER ACTIVITIES RELATING TO THE STUDY

The researcher is a former senior manager within the energy sector, as well as, former British Army officer and has significant experience of leadership development in both sectors. This *a priori* knowledge was important in conducting the research and, whilst supported by academic mechanisms and control measures, provided an effective modem for developing sound praxis-orientated theories, as recognised by the utilised analytical model.

Whilst direct experience in the subject matter is a positive attribute, as demonstrated extensively in qualitative research (Groysberg, Hill & Johnson, 2010), there is an inherent potentiality for bias and subjectivity. This can be experienced during the processes of data gathering when interviewing the respondents, or whilst completing the analysis and developing concepts from the data. Chapter Three describes the mechanisms used to mitigate this potentiality, such as the data gathering approach, the data analysis methods, and the use of a validation study to test the observations from the two case studies. All attempt was made to reduce the potential influence of bias, and the researcher acknowledges this, and also recognises that the benefits outweigh the risks, in terms of the development of relevant theories which are both theoretic- and praxis-orientated.

During the period of study the researcher engaged in various relevant events, either teaching, presenting or attending; all of which have directly contributed to the development of knowledge, understanding and reflection on the research problem.

During the period of study, three student workshops were held at Aberdeen Business School aimed at developing doctoral research strategies. On these occasions, the researcher presented on research progress, early findings from this research and development of potential theories from the analysis, to a panel of professorial staff and fellow doctoral candidates. These sessions proved to be very valuable for the researcher in refining scope and narrowing down on possible demonstrable theories. Additional academic workshops were attended on qualitative data analysis techniques, content analysis and phenomenological research methods. Particularly insightful workshops were held by Dr Constantina Papadopoulou at the University of Dundee on applying phenomenological methods within qualitative research studies, Professor Ashly Pinnington at Robert Gordon University on qualitative theory building and analytical methods, and Professor Dennis Tourish at Royal Holloway on social constructivism and nature of leadership phenomena.

These workshops were supported by ongoing interaction with supervisory staff, including visits to Royal Holloway, University of London with secondary supervisor Professor Dennis Tourish.

Various conferences were attended which provided valuable insight into leadership challenges in the respective sectors. Three of the most valuable were:

- The Society of Petroleum Engineering Conference in Amsterdam (May, 2011) for two days of plenary sessions on Safety Leadership and leadership in the oil and gas industry.
- The Scottish Oil Club, Edinburgh (Feb, 2012) for presentation on values, safety leadership and safe culture at Wood Group by HSE Group Director, Les Thomas.
- Elphinstone Defence Lecture (April, 2012): Leadership lessons from the military.

APPENDIX B – SECTOR COMPARABILITY

There are significant commonalities between the military and energy sectors. These commonalities provide a useful platform and justification for comparative analysis. These commonalities are now discussed.

It is inherent that heavy machinery competency is common across both sectors, as there is a significant requirement for technology and engineering applications to support operational activities. Whether these are oil rig installations in the middle of the Gulf of Mexico or Forward Operating Bases in Helmand, Afghanistan; transportation aircraft moving staff between remote drilling locations or dispersed operational theatres of war; or heavy-load lifting equipment like drilling manifolds or combat bridge laying structures.

Both sectors are recognised as operating in hazardous working environments (Oil and Gas UK, 2013). The commonality between these sectors, of dangerous or hazardous working environments, is that there is a material and ever-present threat of significant accidents, typically resulting in severe impacts like death or serious injury. Dangerous or extreme working environments have a distinct and necessary entanglement with human factors when considering accident causation (Gordon, Flin, Mearns & Fleming, 1996). Despite rapid developments in technological reliability and safer-functionality, accidents continue to occur in the energy sector's challenging working environments, due to the role of human error (Gordon et al, 1996). This was demonstrated in Shell's Sustainability Report (2009) where they reported that during the previous year twenty people died while working for the company. Equally, within the military, both fatalities amongst service personnel and the entanglement of human factors is self-evident and considerable (Adamshick, 2007). For example, in the same year as the Shell report, the UK military lost 108 personnel in Afghanistan (UK MOD, 2013).

Subsequently, due to the extremely hazardous nature of working environments, safety leadership has emerged as one of the primary strategic imperatives of many energy companies. Within the oil and gas segment of the energy sector, important work has been done to further develop improved safety by focusing on the correlation between human factors and leadership (Flin, Mearns & Fleming, 1996). Human factors accidents still occur in challenging environments, and often are attributable to wider poor management practises; a noteworthy example being the media reporting of the BP Deepwater incident in the Gulf of Mexico in 2010 (BBC, 2010). The most recent development of industrial accident causation theory focuses on the contribution of leadership and management to safety; i.e. that the leadership within an organisation have the ultimate responsibility to create safe working conditions for those on the shop floor (Flin, Mearns & Fleming, 1996). Linkages between management and safe operations within hazardous environments have also occurred within the military context, notably

with Adamshick's (2007) review of leadership and safety climate in high-risk military organisations, where recognition has been made that certain leadership attributes are counter-productive in generating safe operational practices (also see Williams, 2005).

Another sector commonality, derived from safety and leadership in hazardous environments, is the devolution of Health, Safety and Environment (HSE) responsibility down to mid and low level management. Due to the nature of geographically remote, specialised, working environments there is a significant degree of highly-empowered, small team, decision making. This devolved 'command' is consistent across both sectors, and even found in the language used within energy sector research. An example can be found in the work of Flin, Stewart & Slaven (1996) where they describe the role of the Offshore Installation Manager as having not "*only daily management responsibilities for a wide range of functions but also the ability to take the role of the on-scene commander should an emergency such as a fire, explosion or blow-out arise*" (pp 4). This requirement for localised leadership comes from not only devolved decision-making, but also from limitations in response capability. In such circumstances, the leadership team cannot immediate call on emergency services for assistance; in the short term, any crisis must be dealt with by local personnel (Flin, Stewart & Slaven, 1996). This is a key commonality across the energy and military sectors. The decentralisation of tactical and operational responsibility is holistic and inseparable; due to the real-time nature of the extreme and dispersed operational environments.

Furthermore, decentralisation is due to the technical nature of operations and application of subject matter expertise; where decision making is devolved to individuals, where their advice is essential, and often isolated; free from extraneous support. This technical knowledge-based skilled workforce, across both sectors, requires adaptability in all its operators and leaders. This is manifest in rapidly changing Standard Operating Practices, where new, more advantageous technical solutions are adopted real-time in real-world contexts. Both sectors experience this dynamic significantly in daily operations.

Another common feature of both sectors is the extended travel and rotation periods, to and from operational working environments. This can be local national or pan-international transportation. For example, in the UK, workers are transported to their offshore workplace via helicopter and spend several weeks working long days, without interval. During this time, interaction with people beyond those on the installation is limited. Such installations vary in size and personnel capacity - up to 300 personnel on large, fixed platforms (Flin, Stewart & Slaven, 1996). These factors of remote and isolated locations, over set periods of time, with limited numbers of fellow colleagues to interact and operate alongside, is entirely indicative of the military working environment, where service personnel are often

deployed on extended travel and rotation periods; sometimes up to several months in challenging and hazardous operational environments.

Another commonality is evident in the international distribution of working environments. Miller (2004) recognised that the oil and gas industry is a complex multi-national network where movements of personnel, technology and expertise across international locations is an essential characteristic of the sector. Indeed, western companies and workforce operate in some of the world's most complex economic, social, and political environments, such as Angola, Nigeria, Columbia, Kazakhstan, Qatar, Iraq, Afghanistan and Libya (Exxonmobil corporate citizenry report 2009). Comparatively, recent deployments of the UK Armed Services, since the mid-1990s, to Cyprus, Sierra Leone, Northern Ireland, Bosnia, Kosovo, East Timor, Iraq, Afghanistan, Libya and Syria mirrors this inherent characteristic.

This globalisation characteristic reveals another commonality between the sectors: the responsibility of expatriate leadership to mentor and develop indigenous workers, in order to develop local talent and leadership capability, with the objective of self-sufficiency over time (Aggour, 2005; Grunow, 2006). This process is usually referred to as 'localisation' or 'nationalisation' (Figliolini, 2008; Weir, 2008; Budhwar & Mellahi, 2006; Dyer, 2006; Harry, 2007). This decreased reliance is not only apparent in the energy sector, but also in international military operational theatres, such as Iraq and Afghanistan, where operations are most effective, or even possible, when conducted alongside indigenous forces (Jones, 2009; Farrell & Gordon, 2009; Bowman, 2009; Feil, 2002; Shake, Bloch Laine & Grant, 1999). With regards to leadership development, this nationalisation factor is significant in the experiences of leaders across both sectors, with executives reporting their international assignment to be the single most influential leadership development experience (Selmer, 2004). Furthermore, one study revealed the development of a core series of cross-cultural leadership competencies that call upon all three of transformational leadership, emotional intelligence, and cultural intelligence (Deng & Gibson, 2009).

Another significant commonality between the two sectors is strategic mega-projects and their associated risks. The commercial investments and value of assets associated with each project are extraordinarily high. For example, engaging in new projects in the energy sector are often valued in terms of billions of pounds sterling, such as EnQuest's £4bn Kraken field development off the coast of Shetland, UK, involving complex heavy machinery and specialist engineering, supported by 20,000 construction jobs. Equivalent finances are mirrored in the 2008 £3bn annually incurred by the UK Armed Forces in deployment to Iraq and Afghanistan, with as much as 18,000 deployed across the two theatres. Coupled to these mega projects, requiring specialist materials, knowledge and expertise, is the significant risks associated with mistakes; human and technical errors; as well as environmental

factors beyond their control. Such risks are clearly demonstrated in recent events such as the 2010 BP Deepwater Horizon disaster in the Gulf of Mexico and British Army soldiers killed in an explosion in Lashkar Gah, Afghanistan, 2012.

Inherent with these mega projects is strategic approaches in core capabilities. As the different operational environments have different needs and challenges, such as within oil and gas drilling, which require innovative designs and adaptability of technological application and practices, the leadership must adapt the core capabilities of the organisation to match. This is also seen in the UK Armed Services as the operational environmental needs and demands of Iraq and Afghanistan have changed, strategic approaches to utilising technologies such as tanks and chemical, biological and nuclear equipment, as the previous, Soviet-moulded, environment became less applicable and relevant (SDSR, 2012).

Lastly, a gender bias with regards to male dominance has been long observed, yet poorly researched, across both sectors. Within the oil and gas industry there has been identified a dominant, or hegemonic, masculinity (Miller, 2004). This male dominance is particularly evident in operational roles within the industry. This observation is also valid of the military. The Oil and Gas UK 2009 Survey identified that just 3.7 percent of offshore operational workers were female, with 30 percent of that figure employed within catering roles (Oil and Gas UK, 2009). This number is lower than the percentage of women in the UK Armed Forces, which in the same year as the oil and gas survey, sat at 9.5 percent (MOD, 2009). Though, the British Army number is lowest of the tri-service (7.9 percent). This male-centric environment has a natural impact on generating an environment characterised by informalism and paternalism based on shared masculine interests that may exclude women from power; individualistic competition is combined with a dominant engineering occupational culture; and gender interactions and occupations are subconsciously influenced by frontier myth and romanticised cowboy hero (Miller, 2004).

APPENDIX C – SAEI LEADERSHIP PERSPECTIVE

An SAEI perspective requires the efficacious application of the models of leadership outlined in **Table 2.1**, transformational leadership, authentic leadership, emotional intelligence and LMX theory. When coupled together they provide valuable insights into the most effective ways to lead people, both individualistically and collectively, in unison.

Leadership within an SAEI perspective is one which can be developed within individual persons. It is not necessarily an inherent skill or trait. It is recognised that whilst basic mental, physical and interpersonal capabilities are inherent, most abilities are not deterministically a function of natural, innate abilities (Kotter, 1988), and that most essential capabilities are developed, such as relationships and motivation (Drouillard and Kleiner, 1996).

Within this SAEI view, leaders must develop certain capabilities which produce good leadership. The table below (**Table H**) describes the sort of capabilities desirable of good leadership, and the sort of skills and behaviours which might be produced as a result.

Leadership Capability	Manifest Skills and Behaviours
Effective Communicators	▪ Effective listening skills. ▪ Ability to articulate ideas ▪ Provide vision ▪ Inspire ▪ Provide feedback ▪ Espouse practical philosophies and values
Demonstrate Integrity	▪ Honest ▪ Fair ▪ Trust-worthy ▪ Display ethics and moral standards
Genuine Interest in Others	▪ Promote wellbeing ▪ Promote personal growth in followers ▪ Understand physical and emotional needs ▪ Value contributions made by others ▪ Be supportive ▪ Display loyalty ▪ Be committed
Rewards and Recognises Achievement	▪ Utilising transactional leadership methods ▪ Utilising transformational leadership methods
Team Orientation	▪ Use coaching methods ▪ Facilitator of team development and performance ▪ Assist ▪ Teach ▪ Motivate
Visionary and Idea-Orientated	▪ Maintain a long-term focus ▪ Demonstrate imagination and creativity
Decisiveness and Responsibility	▪ Effective decision-making ▪ Make difficult decisions ▪ Respond positively in crisis

	▪ *Take-the-can* when needs-must
Competence	▪ Beyond just intelligence ▪ Appropriate level of knowledge and formal training ▪ Maintain a track-record of successes ▪ Record of strong personal performance and favourable outcomes

Table H - 'Good' Leadership. Source: Author (adapted from Drouillard and Kleiner, 1996)

Notions of leadership consistent with a SAEI perspective are gaining ground in the 21st century. Anthony Howard in his book *Humanise* (2015) argues the case for a drive towards empathetic and influential human-centred leadership, where leaders elevate moral conduct, commit to long-term sustainable outlooks and foster virtue-based leadership that builds meaningful, interpersonal relationships, which positively impacts on the social world. Howard's framework represents a SAEI perspective of leadership that deals with the heart of the reason for such a perspective:

> "*Could we advance our relationships in a way that mirrors the massive advances in technology? Imagine if we still depended on the horse and cart, or on watermills and windmills? How grindingly slow and how unsustainable human life would be. Yet at a human level we stumble along in personal, political and commercial relationships in which distrust, exploitation and selfishness are not uncommon… the solution lies in human-centred leaders who put people first, and who integrate the technical with the moral aspects of life and leadership*." (p.40)

Human-centred leadership is conscious of creating improvements in the social and environmental experience of peoples' lives; here leaders are SAEI conduits of progressive change.

Elsewhere, we find evidence of a SAEI perspective in a 2010 leadership guide produced by Scottish Enterprise, which was the result of analysing the experiences and views of 262 business leaders in Scotland and asking them questions of how they lead their businesses and what their inherent beliefs about effective leadership were. The research produced eight consistent principles:

1. leaders must provide a 'big-picture' vision for followers
2. effective leaders generate positive work-place culture
3. effective leaders practice the art of building constructive relationships
4. leaders should put 'we' before 'me'
5. leaders understand the power of sustained performance
6. humility was a vital leadership attribute to display
7. effective communication as being at the heart of inspirational leadership

8. effective leaders always elevate personnel before process

These eight principles are truly anthropocentric in orientation and generate a picture of a SAEI perspective of good leadership. They value effective communications and are socially-responsible with skills and behaviours that generate strong interpersonal relations within social groupings. They are long term in orientation and focus on collective successes and sustained improvements; whilst looking to improve the environment, with its cultural and change needs, and the social, with its individualised consideration and transparency and shared agenda.

APPENDIX D – CONSTRUCTION FACTORS IN LEADERSHIP DEVELOPMENT PROGRAMMES

Several researchers have attempted to identify key design and construction principles for effective leadership development programmes (Cacioppe, 1998; Tourish & Pinnington, 2007; Leskiw & Singh, 2007; Weiss & Molinaro, 2006; Fulmer & Wagner, 1999). These researches have been synthesised in under seven construction factor.

Factor One: Linkages to Strategic Business Imperatives

Identification and articulation of strategic business imperatives and how corporate leadership may contribute to their actualisation is a necessary step in constructing effective leadership development programmes, which, above all, tangibly affect strategic imperatives and organisational development (Leskiw & Singh, 2007; Cacioppe, 1998; Fulmer & Wagner, 1999; Tourish & Pinnington, 2007). 'Strategic elephants' (Argenti, 1998), i.e. critical issues, must be clarified and agreed prior to any subsequent intervention design (Cacioppe, 1998). This must be done in conjunction with the senior executive team and not delegated down to human resource professionals or third party partners (Fulmer & Wagner, 1999; Leskiw & Singh, 2007).

Factor Two: Setting Developmental Objectives

The purpose and learning objectives of any leadership development programme must be defined alongside what sort of phenomena should be demonstrated subsequent to the completion of the programme (Cacioppe, 1998). Multiple-tiers factors of: (a) prior development, (b) level of development (individual, team, corporate), and, (c) levels of management seniority, must all be considered at this stage. Resources, time and operating level constraints must also be defined and factored into design and implementation (Cacioppe, 1998). Tourish and Pinnington (2007) identify at this stage the appropriate behaviours and developmental needs of the leaders, in relation to the strategic needs of the previous stage. Weiss & Molinaro (2006) use leadership narratives at this stage to communicate buy-in regarding the purpose and role of the leadership development programme within the organisation.

Factor Three: Identify Developmental Methods

Constructing leadership development interventions, containing sets of methods and approaches, is like any business strategic processes, complex, and requires discipline attention and focus in design and structures. It is usually human resource professionals who determine the content, methods and structure of this stage in construction (Cacioppe, 1998), however, this should not be done with the

exclusion of sufficient senior management guidance and involvement (Vicere, 1997). Also, if necessary, external consultants are typically engaged at this stage (Cacioppe, 1998; Leskiw & Singh, 2007).

Which leadership development methods are appropriate to the programme must be explicitly identified; such as usage of case studies or action-learning projects, team building activities, classroom based training, presentations, assignment submissions, 360 appraisals, stretch assignments (Cacioppe, 1998; Tourish, 2009; Day, 2001; et al). At present, the six main leadership development methods being practiced across industry are (Day, 2001; Tourish & Pinnington, 2007): 360-degree feedback, coaching, mentoring, networking, job assignments and action learning.

Weiss & Molinaro (2006) point out leadership development has traditionally been either single-solution or multiple-solution approaches; these approaches have resulted in key failings, such as poor linkages between interventions and connectivity to business needs, confusion among leaders (fragmentation of interventions and array of courses and seminars) and failure to generate value for the organisation - due to fragmentation and poor connectivity, resources are not efficiently utilized. The subsequent integrated-solution proposed by the researchers focuses on organisational connectivity, holistic value and long-term focus.

Also, the selection criteria for participants should be identified and the process aligned to succession plans and high potential development (Tourish & Pinnington, 2007; Fulmer & Wagner, 1999)

Factor Four: Specify Learning and Service Provision Partners

Delivery partners for the programme are identified, against a set criterion, and relationships are developed (Cacioppe, 1998; Tourish & Pinnington, 2007). Example partners might be: a university, management institute, consultancy or third sector organisation (Bennington & Hartley, 2009). This relationship will be important in assisting in the completion of design and delivery specifications (Cacioppe, 1998). However, close attention must be made to ensure that the delivery partners provide a service consistent with the agreed criterion and not allow delivery creep (i.e. their natural biases to deliver themes and methods which they are comfortable with or perceive 'work better') to pull the program off the key objectives and issues (Bennington & Hartley, 2009). Equally, contingent business issues may result in objectives and issues changing, resulting in amendments to the developmental content (Cacioppe, 1998; Tourish & Pinnington, 2007; Leskiw & Singh, 2007). Third party partners tend to struggle with reflexivity with regards to the final point.

Factor Five: Programme Delivery Evaluation

Evaluation of delivery is a vital aspect of leadership development construction (Cacioppe, 1998; Leskiw & Singh, 2007; Tourish & Pinnington, 2007), and is explicitly identified in all of the extant construction strategies. Delivering the agreed developmental outcomes against the business objectives should be evaluated and assessed relatively frequently in order that desired competencies will emerge during and subsequent to the developmental interventions (Leskiw & Singh, 2007; Tourish & Pinnington, 2007). The Vicere (1997) model recommends evaluation after each of the seven steps in the design of leadership development programmes; Cacioppe (1998) recommends at least two steps of thorough evaluation. Kirkpatrick's (1959) well known evaluation is a useful evaluation guiding criteria, regularly used to evaluate leadership development programmes. How else interventions might be evaluated is discussed below with the Impact factor.

Factor Six: Organisational Integration

This aspect is perhaps the area most poorly implemented and evaluated (Pinnington & Tourish, 2007), and might actually provide the sort of dramatic breakthrough needed to advance leadership development praxis (Day, 2001). Developmental interventions must be aligned with wider organisational factors, so that leaders can tangibly see how certain leadership skills and behaviours support operational effectiveness and success (Weiss & Molinaro, 2006; Cacioppe, 1998; Leskiw & Singh, 2007; Tourish & Pinnington, 2007). This generates a form of institutionalisation of leadership, where it is instinctively and inseparably morphed with corporate culture and social structures and interaction. For organisational integration to be successful, any commitment to developing leaders must recognise the systemic view of leadership, and its social capital value, and that leadership is less of a personal development experience, but rather a corporate asset and situated within the particulars of organisational context (Day, 2001; Cunningham, 2011).

Factor Seven: Evaluate Programme Strategy

Finally, the strategic imperatives of the developmental intervention must be reviewed for changes in context, social needs, operational needs and impact on business performance. This evaluation should critically assess the systemic impact of the interventions and signal whether adjustments must be made to design and delivery. This should be a reflexive and honest process, and receive support from strategic levels of the business (Cacioppe, 1998; Leskiw & Singh, 2007; Tourish & Pinnington, 2007).

APPENDIX E – SEMI-STRUCTURED INTERVIEW RESEARCH QUESTIONS

Below is the questions, covering the cardinal themes, asked of every participant in the research.

These questions were tested and refined through multiple discussions at Aberdeen Business School. Where there are more than one question, within a cardinal theme, it was felt these were needed in order to explore aspects that eluded consideration in the previous question (within the theme); i.e. they opened out more the respondents' breadth of reflections and observations. These were again refined during the first case study data gathering process, as more lessons were learned.

General context setting: Organisational leadership

Q1. In your opinion, what sort of desirable leadership is required of leaders in your organisation?

Q2. How well are they demonstrated by leaders across the organisation?

Theme one: Training delivery

Q3. Who is delivering your leadership development training? And, how effective are they at developing leadership in participants?

Q4. Which aspects of the programme had the biggest impact on your leadership development, and why?

Q5. How might the organisation improve the quality of delivery on the programme?

Theme two: Operational contextualisation

Q6. How does the programme improve leadership in relation to dealing with real-world contextual challenges?

Theme three: Feedback and challenging performance

Q7. How is feedback given to participants in relation to their individual performances? And, how challenging, in terms of remediating performance shortcomings, is the feedback given?

Q8. Does the feedback relate to what the organisation's expectations of your performance are?

Q9. What effect has the performance feedback have on future performance of the participants?

Theme four: Impact of the programme on individual / organisation

Q10. What impact had the programme on your leadership? And, how much of your development as a leader is a product of the leadership development training you have received on this programme?

Q11. How do they evaluate the impact of the programme on individual participants and the organisation?

Theme five: corporate values integration

Q12. In what way are organisational (corporate) values embedded into the programme? And, how important are those values for practicing leadership in this organisation?

Focus Group Questions:

Focus group participants were asked the same questions as above, however, each question was prefixed with "***Comparing your experiences of conducting a military AND an energy leadership development programme***…(followed by respective question above)"?

APPENDIX F – PARTICIPANT BRIEFING NOTE

Below is the participation briefing notes sent to every respondent of the research:

Doctorate Research – Aberdeen Business School, Robert Gordon University

Participation Briefing Notes

Student: Matthew Anderson, Aberdeen Business School

Supervisors: Professor Peter Strachan, Aberdeen Business School; Professor Dennis Tourish, Royal Holloway, University of London

Research subject: "An Evaluation of Five Key Themes of Mid-Level Leadership Development within the Energy and Military sectors"

- All participating persons / organisations are to be **anonymous** throughout the research.
- All data collected will be held **strictly confidential** and **tightly controlled**.
- I assure you, due to the sensitive and competitive nature of the data and contributing that your personal views will **not be shared with your organisation**.
- Your organisation will be part of a comparative **two case studies analysis**.
- It must be stated that the research is not reviewing leadership in your organisation (i.e. 'how good your leaders are'); rather, it is **looking at how leadership development improves your organisation as well as yourselves**.
- The research is looking at **five major themes** of leadership development:
    - Training delivery
    - Contextualisation
    - Performance on programme
    - Impact
    - Values integration

    (More details, in the form of specific questions, will be given during the interview)
- Research data is required across **four levels**:
    - Strategic owner (board level) - Interview
    - Leadership Development Lead/Manager - Interview
    - Trainer - Interview

- Participants - Interview

- Research methods are face-to-face **semi-structured interviews** (conducted in-house at organisations' premises; interviews taking no longer than 90-120mins with each level)
- Emerging **best practice** and **recommendations** for future usage of the five key themes will be fed back to participating organisations, via presentations.
- Period of research data gathering and involvement will be ****. (suitable date)

Matthew Anderson

[Date of correspondence]

APPENDIX G – CODING WORKSHEETS

Below are included samples of the coding worksheets for energy and military case studies and validation study.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1			TYPES OF CODING			CODES		CARDINAL THEMES	1.1	1.2	1.3	1.4	1.5	2.1	2.2
2	INTERVIEWEE	ANONYM	DESCRIPTIVE *Also see interview face sheet	TOPIC	ANALYTICAL	CODING REFERENCE	FULL CODING DESIGNATION	A/B/C/D/E							
3															
4	DH	Energy Leadership Trainer (ELT)	"...not thinking in business ends..." [p2]	Leadership dilemma	Operational fixation	ELT-001	ELT-001-ABD-2.1/2.2	D						1	1
5			"...biggest thing they struggle with..." [p2]	Leadership dilemma	Big picture myopia	ELT-002	ELT-002-D-2.1/2.2/2.3	D						1	1
6			"...not thought that through properly..." [p2]	Leadership dilemma	Strategic myopia	ELT-003	ELT-003-BCD-2.1/2.2	BCD						1	1
7			"...everyone is going to share..." [p2]	Leadership dilemma	Collaborative leadership focus	ELT-004	ELT-004-B-1.1/1.2/1.3/2.2/2.3/3.1/3.2	B	1	1	1				1
8			"...it exists at quite a senior level..." [p2]	Leadership dilemma	Leadership gap / discord	ELT-005	ELT-005-AD-2.1	AD						1	
9			"...there is a gap..." [p2]	Leadership dilemma	Leadership gap / discord	ELT-006	ELT-006-ACD-1.4/2.3/3.1/3.2/3.3	ACD				1			
10			"...up to their necks in muck..." [p3]	Leadership dilemma	Strategic and operational myopia	ELT-007	ELT-007-BCD-2.1/2.2/2.3/2.4	BCD						1	1
11			"...personal development..." [p3]	Programme participation	Egoistic development focus	ELT-008	ELT-008-CD-1.1/1.5/2.2/2.3/3.2	CD	1				1		1
12			"...a tick box exercise..." [p3]	Programme participation	Attendance course	ELT-009	ELT-009-CD-1.1/1.2/1.3/2.2/3.2	CD	1	1	1				1
13			"...I know all that..." [p3]	Programme participation	Prima donas - arrogance	ELT-010	ELT-010-CD-1.3/1.4/3.1/3.2	CD			1	1			
14			"...they're not really grounded..." [p3]	Programme participation	Prima donas - know it all types	ELT-010	ELT-010-CD-1.3/1.4/3.1/3.2	CD			1	1			
15			"...not sure they fully understand..." [p3]	Leadership dilemma	Strategic myopia	ELT-011	ELT-011-BCD-2.1/2.2/2.4/3.1/3.2	BCD						1	1
16			"...aiming..." [p4]	Programme delivery	Instructor identity ambiguity	ELT-012	ELT-012-AB-1.2/1.3/2.1	AB		1	1			1	
17			"...all have had senior roles" [p4]	Programme delivery	Post-future-role development	ELT-013	ELT-013-ABD-1.2/2.2/3.1	ABD		1					1
18			"...that bit more strategically" [p4]	Programme delivery	Purpose fail (strategy link)	ELT-014	ELT-014-ABD-1.2/2.1/2.4	ABD		1				1	1
19			"...enginneer, HR, publishing, retail..." [p5]	Programme delivery	Mismatched experience (LD team)	ELT-015	ELT-015-ABD-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABD		1	1	1	1	1	1
20			"...ten other international companies" [p5]	Programme delivery	Globalisation cultural dev	ELT-016	ELT-016-ABD-1.2/1.3/2.2/3.1/3.2/3.3	ABD		1	1				1
21			"...don't appear to be that well prepared" [p5]	Programme delivery	Not fit-for-purpose	ELT-017	ELT-017-ABDE-1.5/2.1/2.4	ABDE					1	1	
22			"...does it add value" [p6]	Contextualisation	myopia (egoistic/strategy/values)	ELT-018	ELT-018-ABE-2.2	ABE							1
23			"...value of course not seen" [p6]	Contextualisation	myopia (egoistic/strategy/values)	ELT-019	ELT-019-ABE-2.2	ABE							1
24			"...getting out the weeds" [p6]	Contextualisation	myopia (egoistic/strategy/values)	ELT-020	ELT-020-AB-2.2	AB							1
25			"...not equipped..." [p6]	Contextualisation	Insufficient contextualisation	ELT-021	ELT-021-AB-1.2/1.4/2.4	AB		1		1			
26			"...holding their hand" [p6]	Contextualisation	Challenging Immaturity	ELT-022	ELT-022-AB-1.4/2.2/3.1/3.2/3.3	AB				1			1
27			"...probably through conversations" [p7]	Contextualisation	Merely contextualisation through conversation	ELT-023	ELT-023-AB-1.2/2.1/3.1	AB		1				1	
28			"...career development" [p7]	Contextualisation	Egoistic myopia	ELT-024	ELT-024-AB-1.3/1.4/2.1/2.2/2.3/2.4/3.1/3.2	AB			1	1		1	1
29			"...different methods..." [p7]	Performance feedback	(un)structured feedback	ELT-025	ELT-025-AC-1.2/1.3/1.4	AC		1	1	1			
30			"...I imagine it is pretty high" [p7]	Performance feedback	Assumed integration	ELT-026	ELT-026-AC-1.2/1.3/1.4	AC		1	1	1			
31			"...continually given feedback" [p7]	Performance feedback	(un)structured feedback	ELT-027	ELT-027-AC-1.2/1.3/1.4	AC		1	1	1			
32			"...seeking feedback" [p7]	Performance feedback	(un)structured feedback	ELT-028	ELT-028-ACE-1.2/1.3/1.4	ACE		1	1	1			
33			"...it's a continual thing..." [p8]	Performance feedback	Feedback illusion (that it is happening)	ELT-029	ELT-029-AC-1.2/1.3/1.4	AC		1	1	1			
34			"...people will shy away if given bad news.." [p8]	Performance feedback	Challenge conflict	ELT-030	ELT-030-ACD-1.2/1.3/1.4	ACD		1	1	1			
35			"...given where there is bad behaviour..." [p8]	Performance feedback	Bad behaviour remediation	ELT-031	ELT-031-ACD-1.2/1.3/1.4	ACD		1	1	1			
36			"...trying to focus on the positives..." [p8]	Performance feedback	Only good news	ELT-032	ELT-032-AC-1.2/1.3/1.4	AC		1	1	1			
37			"...they do get a lot of value from it..." [p8]	Performance feedback	Feedback Assumption	ELT-033	ELT-033-ACD-1.2/1.3/1.4	ACD		1	1	1			
38			"...brought to their attention and reinforced..." [p9]	Performance feedback	"360 work's!"	ELT-034	ELT-034-AC-1.2/1.3/1.4	AC		1	1	1			
39			"...don't see is the end result..." [p9]	Programme impact	Isolationism (just one week)	ELT-035	ELT-035-AD-1.4/1.5/2.1/2.3/3.1/3.2	AD					1	1	
40			"...all I get is the noise..." [p9]	Programme impact	Isolationism (no dovetailing)	ELT-036	ELT-036-AD-1.4/1.5/2.1/2.3/3.1/3.2	AD					1	1	
41			"...something that we are missing..." [p9]	Programme impact	Isolationism (no joined-up with organisation)	ELT-037	ELT-037-AD-1.4/1.5/2.1/2.3/3.1/3.2	AD					1	1	
42			"...there is lots of it..." [p9]	Programme impact	Quantity assumption	ELT-038	ELT-038-AD-1.1/1.2/1.3/2.2/2.3/2.4/3.1/3.2/3.3	AD	1	1	1				1
43			"...it's become a fast track..." [p9]	Programme impact	Egoistic development focus	ELT-039	ELT-039-AD-1.2/1.3/2.1/2.2/3.1/3.2/3.3	AD		1	1			1	1
44			"...they get back on the treadmill again..." [p10]	Programme impact	Contextual disconnect	ELT-040	ELT-040-ADE-1.5/2.2/2.3/2.4/3.1/3.3	ADE					1		1
45			"...very much about cash in, profit driven..." [p10]	Programme impact	Strategic / operational myopia	ELT-041	ELT-041-AD-2.1/2.3/3.3	AD						1	
46			"...either gets diluted or lost completely..." [p10]	Programme impact	Contextual disconnect	ELT-042	ELT-042-ABD-1.3/2.1/2.2/2.3/2.4	ABD			1			1	1
47			"...it's up to the person..." [p10]	Programme impact	Local (not systemic) development	ELT-043	ELT-043-ABDE-1.1/1.3/2.1/2.2/3.1/3.2	ABDE	1		1			1	1
48			"...make the most without contravening..." [p10]	Values integration	Values-operations paradox	ELT-044	ELT-044-ADE-2.2/2.3	ADE							1
49			"...remind myself of what they are..." [p11]	Values integration	Values-contest disconnect	ELT-045	ELT-045-AE-1.3/2.2/2.3/3.1	AE			1				1
50			"...the business should be in five years..." [p11]	Values integration	Values-future direction recognition	ELT-046	ELT-046-BDE-2.1/2.2/2.3/2.4	BDE						1	1
51			"...a pressure which can almost conflict..." [p11]	Values integration	Values-operations paradox	ELT-047	ELT-047-BE-2.2/2.3	BE							1
52			"...don't manage that change process well..." [p11]	Values integration	Values-change catalyst	ELT-048	ELT-048-DE-1.3/1.5/2.1/2.2/2.3/2.4/3.2	DE			1		1	1	1
53			"...safety is ingrained in everything..." [p11]	Values integration	Safety exemplar: operational agenda instead?	ELT-049	ELT-049-BDE-1.5/2.3/2.4/3.3	BDE					1		
54			"...the way they interact with senior people..." [p12]	Values integration	Ingratiation risk	ELT-050	ELT-050-DE-2.3/3.2/3.3	DE							
55			"...boxed in and opportunity wont exist..." [p12]	Values integration	Selection disconnect	ELT-051	ELT-051-BE-1.1/1.3/1.4/3.2	BE	1		1	1			
56									6	21	25	21	9	21	27
57	WS	Energy Programme Owner (EPO)	"...focus on delivery..."	Organisational leadership	Operational myopia	EPO-0010	EPO-0010-ABD-1.3/2.1/2.2/2.3	ABD			1			1	1
58			"...safety leadership..."	Organisational leadership	leadership-process conflation	EPO-001	EPO-001-DE-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	DE		1	1	1	1	1	1
59			"...engage people..."	Organisational leadership	Anthropocentric intention	EPO-002	EPO-002-DE-1.1/1.2/1.3/1.5/2.2/2.3/2.4/3.1/3.2	DE	1	1	1		1		1
60			"...more targetted in who they develop..."	Delivery	Hi-Po intention	EPO-003	EPO-003-AD-1.1/1.2/1.3/1.5/2.2/2.3/2.4/3.1/3.2	AD	1	1	1		1		1
61			"...no sausage machine approach..."	Delivery	Unsystemic	EPO-004	EPO-004-AD-1.4/2.1/2.2/3.1	AD				1		1	1
62			"...scientific assessment..."	Delivery	Systems Assumption	EPO-005	EPO-005-AD-1.4/2.2	AD				1			1

		TYPES OF CODING			CODES		CARDINAL THEMES	1.1	1.2	1.3	1.4	1.5	2.1
INTERVIEWEE	ANONYM	DESCRIPTIVE "Also see interview face sheets	TOPIC	ANALYTICAL	CODING REFERENCE	FULL CODING DESIGNATION	A/B/C/D/E						
AR	Military Leadership Trainer (MLT)	"A prior understanding of leadership"	Organisational leadership	Selection essentials	MLT-001	MLT-001-ADE-1.1/1.2/1.3/1.5/2.2/2.4/3.3	ADE	1	1	1		1	
		"desire for responsibility"	Organisational leadership	Selection essentials	MLT-002	MLT-002-ADE-1.2/1.3/1.5/2.3/2.4	ADE		1	1		1	
		"the core leadership dimensions...(listed full set verbatum)"	Organisational leadership	Prescribed behaviours	MLT-003	MLT-003-ABDE-1.2/1.3/2.1/2.2/2.4/3.2/3.3	ABDE		1	1			1
		"it is about what the army expects"	Organisational leadership	Prescribed behaviours	MLT-004	MLT-004-ABDE-1.2/2.1/2.2/2.3/2.4/3.3	ABDE		1				1
		"...can not be any more firm on values and standards..."	Organisational leadership	Necessary criteria	MLT-005	MLT-005-ADE-1.2/1.4/2.4/3.3	ADE		1		1		
		"...moral courage..."	Organisational leadership	Necessary criteria	MLT-006	MLT-006-ADE-1.2/2.1/2.2	ADE		1				1
		"do what you ought, not what you want"	Organisational leadership	Necessary criteria	MLT-007	MLT-007-ADE-1.1/1.2/1.3/1.5/2.2/2.3/2.4/3.3	ADE	1	1	1		1	
		"zero tolerance for breach of integrity (lying etc)"	Organisational leadership	Necessary criteria	MLT-008	MLT-008-ADE-1.4/2.1/3.2	ADE				1		1
		"...not excellent in all areas, always adapting..."	Organisational leadership	Humility-learning mindset	MLT-009	MLT-009-ABCDE-1.4/1.5/2.2/2.3/2.4/3.3	ABCDE				1	1	
		"...let them fail: debrief, repeat, understand..."	Organisational leadership	Challenging performance	MLT-010	MLT-010-ABCD-1.3/1.4/1.5/	ABCD			1	1	1	
		"V3 doc...constructive debriefing...builds confidence"	Organisational leadership	Challenging performance	MLT-011	MLT-011-ABCD-1.3/1.4/1.5/2.1/2.2	ABCD			1	1	1	1
		"...best way: command appointments on exercise...never enough"	Organisational leadership	Context-leadership linkages	MLT-012	MLT-012-ABC-1.1/1.4/2.2/3.1/3.3	ABC	1			1		
		"...appointments: never enough...reflects real-life!"	Organisational leadership	Context-leadership linkages	MLT-013	MLT-013-ABC-2.1/2.2/2.4	ABC						1
		"...comd appts on exercise does links to leadership dimensions!"	Organisational leadership	Context-leadership linkages	MLT-014	MLT-014-ABCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.4	ABCDE	1	1	1	1		1
		"...profile...interest...AOSB..."	Selection	Standardised selection process	MLT-015	MLT-015-ABCDE-1.2/2.1/2.2/2.4/3.3	ABCDE		1				1
		"...AOSB, rigorous three days...report linked to leadership dimension"	Selection	Standards-expectations-selection integration	MLT-016	MLT-016-ABCDE-1.2/2.1/2.2/3.1	ABCDE		1				1
		"...credibility"	Delivery	Mentor authority	MLT-017	MLT-017-ABC-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABC	1	1	1	1	1	1
		"...selected by cap badge to represent"	Delivery	Quality assurance	MLT-018	MLT-018-ABC-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABC	1	1	1	1	1	1
		"...huge operational experience..."	Delivery	context-authority linkage	MLT-019	MLT-019-ABC-1.5/2.1/2.4/3.1/3.3	ABC					1	1
		"...personality: relate, personable, inter-personal relations"	Delivery	leaders develop leaders	MLT-020	MLT-020-ACDE-1.1/1.2/1.3/1.5	ACDE	1	1	1		1	
		"...field officer more than desk officer..."	Delivery	Var-captains	MLT-021	MLT-021-ABC-1.1/1.5/2.1/2.2/2.4/3.2	ABC	1				1	1
		"operational experience"	Delivery	Var-captains	MLT-022	MLT-022-ABC-1.1/1.5/2.1/2.2/2.4/3.1/3.3	ABC	1				1	1
		"strategic / high level awareness and understanding"	Delivery	Big picture integration	MLT-023	MLT-023-ABCD-1.1/1.5/2.1/2.2/2.4/3.1/3.3	ABCD	1				1	1
		"...mixed capbadge in DS: corps and infantry"	Delivery	systemic representation	MLT-024	MLT-024-ABCD-1.1/1.2/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCD	1	1			1	1
		"..estimate and orders experience..key part of leadership"	Delivery	Big picture integration	MLT-025	MLT-025-BD-1.4/2.1/3.1/3.3	BD				1		1
		"...planning and decision making at brigade level..."	Delivery	Big picture integration	MLT-026	MLT-026-BD-1.4/2.1/3.1.3.3	BD				1		1
		"...simplicity: translating it to lower voices!"	Delivery	Mentor-coaching	MLT-027	MLT-027-ABCD-1.1/1.2/1.5/3.1/3.2/3.3	ABCD	1	1			1	
		"...CSgts seen end product very often...upward perspective..."	Delivery	Mentor-coaching	MLT-028	MLT-028-ABCD-1.1/1.2/1.3/1.4/2.2/2.3/2.4/3.1/3.2/3.3	ABCD	1	1	1	1		
		"...prior courses experience..."	Delivery	Quality assurance	MLT-029	MLT-029-AC-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	AC	1	1	1	1	1	1
		"...not fussed by rank... v professional and confident..."	Delivery	Authentic leadership	MLT-030	MLT-030-AC-1.5/2.4/3.3	AC					1	
		"fit to commission"	Contextualisation	Identifying a benchmark	MLT-031	MLT-031-ABCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCDE	1	1	1	1	1	1
		"...whatever arm, must be consistent...reach comd standard"	Contextualisation	Identifying a benchmark	MLT-032	MLT-032-ABCDE-1.1/1.2/1.5/2.1/2.4/3.1/3.2	ABCDE	1	1			1	1
		"...always looking for current context"	Contextualisation	Pursuit of relevance	MLT-033	MLT-033-ABCD-1.1/1.5/2.4/3.3	ABCD	1				1	
		"...also future context; not just the war in Afghanistan"	Contextualisation	Pursuit of future relevance	MLT-034	MLT-034-ABCD-1.2/1.5/2.2/2.4/3.3	ABCD		1			1	
		"something else WILL come up..thus generic identification"	Contextualisation	Reflexivity amongst contextualisation	MLT-035	MLT-035-ABCD-1.2/1.3/1.5/2.2/2.4/3.3	ABCD		1	1		1	
		"complexity is key... develop effective intelligence..."	Contextualisation	Identifying commonality	MLT-036	MLT-036-ABCDE-1.2/1.3/1.5/2.3/2.4/3.3	ABCDE		1	1		1	
		"...regular feedback across Academy... subsequent alignment.."	Contextualisation	Humility-learning mindset	MLT-037	MLT-037-ABCDE-1.1/1.2/1.4/1.5/2.1/2.4/3.1/3.2/1.3	ABCDE	1	1		1	1	1
		"hot and cold debriefs..hot with peers, cold without..."	Performance	Structured feedback	MLT-038	MLT-038-CD-1.1/1.2/1.3/1.4/2.1/2.2/2.4/3.3	CD	1	1	1	1		1
		"...cadets like feedback, particularly the good ones..."	Performance	Humility-learning mindset	MLT-039	MLT-039-ABCDE-1.1/1.2/1.3/1.4/2.1/2.2/2.4/3.3	ABCDE	1	1	1	1		1
		"...use the V3, then cold debrief, open and honest.."	Performance	Structured feedback	MLT-040	MLT-040-ABCDE-1.3/1.4	ABCDE			1	1		
		"formal, twice every 3 months ± 3..performance review..."	Performance	Structured feedback	MLT-041	MLT-041-ABCDE-1.3/1.4/2.1/3.1	ABCDE			1	1		1
		"..daily basis...from morning inspections onwards..."	Performance	Structured feedback	MLT-042	MLT-042-ABCDE-1.3/1.4/1.5/2.1	ABCDE			1	1	1	1
		"...formal and informal from the instructors..."	Performance	Structured feedback	MLT-043	MLT-043-ABCDE-1.2/1.3/1.4/1.5/2.1/3.1	ABCDE		1	1	1	1	1
		"...intimate coaching and mentoring..."	Performance	Mentor-coaching	MLT-044	MLT-044-ABCD-1.2/1.3/1.4	ABCD		1	1	1		
		"...coaching methods developed from ASLS..."	Performance	Trained-up instructors	MLT-045	MLT-045-ACD-1.3/1.4/3.1/3.3	ACD			1	1		
		"...mentoring - all DS high calibre and formidable op exper."	Performance	Mentor-authority	MLT-046	MLT-046-ABCD-1.4/2.2/2.4/3.3	ABCD				1		
		"...what they aspire to be..."	Performance	Role-modelling	MLT-047	MLT-047-ACDE-1.4/1.5/2.4/3.3	ACDE				1	1	
		"(feedback) is not to fail its to bring on.."	Performance	Commitment to succeed	MLT-048	MLT-048-CDE-1.4/2.1/2.2	CDE				1		1
		"...(feedback) is difficult...struggle with constructive criticism"	Performance	Commitment to succeed	MLT-049	MLT-049-CDE-1.4/2.1/2.2	CDE				1		1
		"...self awareness essential.."	Performance	Humility-learning mindset	MLT-050	MLT-050-ABCDE-1.2/1.3/1.4	ABCDE		1	1	1		
		"tool peer assessment to support"	Performance	Structured feedback	MLT-051	MLT-51-ABCDE-1.1/1.2/1.3/1.4/1.5/3.1/3.2/3.3	ABCDE	1	1	1	1	1	
		"reality check - back up"	Performance	Structured feedback	MLT-052	MLT-052-ABCDE-1.2/1.4	ABCDE		1		1		
		"avoids DS bias...concours and supports dev"	Performance	Quality assurance	MLT-053	MLT-053-CD-1.1/1.4/1.5/2.3/3.1/3.2	CD	1			1	1	
		"most of the time consistent...can lead to grudges"	Performance	Quality assurance	MLT-054	MLT-054-CD-1.1/1.3/1.4/2.3	CD	1		1	1		
		"good team work observations"	Performance	Group development orientation	MLT-055	MLT-055-CDE-1.1/1.2/1.3/1.4/1.5/3.1/3.2	CDE	1	1	1	1	1	
		"objectivity.. Integrity and moral courage..3rd part assement"	Performance	Humility-learning mindset	MLT-056	MLT-056-ABCDE-1.2/1.3/1.4/1.5	ABCDE		1	1	1	1	
		"confidence versus arrogance.. Fine line, try to control this"	Performance	Humility-learning mindset	MLT-057	MLT-057-ABCDE-1.2/1.3/1.4	ABCDE		1	1	1		
		"...parents and friends recognise the change...growing up"	Performance	Extrinsic confirmation	MLT-058	MLT-058-CD-1.4/1.5/3.3	CD				1	1	
		"...rankings... stretches them..."	Performance	Competition catalyst	MLT-059	MLT-059-CD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/3.1	CD	1	1	1	1	1	1
		"...stretch assignments...improves confidence & judgement"	Performance	Challenge-rewards	MLT-060	MLT-060-CD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.4/3.1/3.3	CD	1	1	1	1	1	
		"...progression...comissioning.."	Impact	Challenge-rewards	MLT-061	MLT-061-CD-1.1/1.2/1.2/2.1/2.2/2.4/3.1/3.2/3.3	CD	1	1				1
		"...syllabus objectives...validated against them..."	Impact	Identifying a benchmark	MLT-062	MLT-062-ABCDE-1.3/2.1/2.2/3.1/3.2	ABCDE			1			1
		"...seeing them in comd appts is key area..."	Impact	Progressive scruting and challenge	MLT-063	MLT-063-BCDE-1.2/1.3/1.4/2.4	BCDE		1	1	1		
		"fit to commission" (debriefs, P-File, full records, written work)	Impact	Identifying a benchmark	MLT-064	MLT-064-ABCDE-1.2/1.4/1.5/2.1/2.2/2.3/3.2	ABCDE		1		1	1	1
		"possible back-terming"	Impact	Challenge-rewards	MLT-065	MLT-065-CD-1.2/1.3/1.4/2.4	CD		1	1	1		

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T
1			TYPES OF CODING			CODES		CARDINAL THEMES	1.1	1.2	1.3	1.4	1.5	2.1	2.2	2.3	2.4	3.1	3.2	3.3
2	INTERVIEWEE	ANONYM	DESCRIPTIVE *Also see interview face sheet	TOPIC	ANALYTICAL	CODING REFERENCE	FULL CODING DESIGNATION	A/B/C/D/E												
3																				
4	AP	Validation Leader 01	"...subject matter...technical credibility..."	Organisational leadership	Technical-results driven	VL03-0001	VL03-0001-BCDE-1.1/1.2/1.2/2.2/2.3/3.2	BCDE	1				1	1	1	1			1	
5		Validation Leader 03	"...leaders...what you do, not how you do it..."	Organisational leadership	Delivery not interaction	VL03-001	VL03-001-BCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	BCDE	1	1	1	1	1	1	1	1	1	1	1	1
6		Validation Leader 03	"...do things right, not the right thing..."	Organisational leadership	Technical-results driven	VL03-002	VL03-002-BCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	BCDE	1	1	1	1	1	1	1	1	1	1	1	1
7		Validation Leader 03	"leadership interaction is not scrutinised"	Organisational leadership	Delivery not interaction	VL03-003	VL03-003-BCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	BCDE	1	1	1	1	1	1	1	1	1	1	1	1
8		Validation Leader 03	"...(military) a social issue..."	Organisational leadership	Social issue	VL03-004	VL03-004-BCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	BCDE	1	1	1	1	1	1	1	1	1	1	1	1
9		Validation Leader 02	"...safety is the only value..."	Organisational leadership	Results orientation	VL02-005	VL02-005-BCDE-1.2/1.5/2.1/2.2/2.3/2.4/3.1/3.3	BCDE		1			1	1	1	1	1	1		1
10		Validation Leader 02	"(safety) a process approach, not behavioural..."	Organisational leadership	Results orientation	VL02-006	VL02-006-BCDE-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.2/3.3	BCDE		1	1	1	1	1	1	1	1		1	1
11		Validation Leader 01	"seniority/promotion is a technical issue"	Organisational leadership	Technical-results driven	VL01-007	VL01-007-BCDE-1.2.1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.2/3.3	BCDE		1	1	1	1	1	1	1	1		1	1
12		Validation Leader 01	"...all about technical. Competency based."	Organisational leadership	Technical-results driven	VL01-008	VL01-008-BCDE-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.2/3.3	BCDE		1	1	1	1	1	1	1	1		1	1
13		Validation Leader 01	"...variable quality. Terrible man managers... top"	Organisational leadership	Social issue	VL01-009	VL01-009-BCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	BCDE	1	1	1	1	1	1	1	1	1	1	1	1
14		Validation Leader 02	"...risk averse, in the extreme..."	Organisational leadership	Results fixation	VL02-010	VL02-010-BCDE-1.2/1.3/2.1/2.2/2.3	BCDE		1	1			1	1					
15		Validation Leader 02	"...abstract expertise, great at training...not familiar"	Programme delivery	Lack of credulity & realism	VL02-011	VL02-011-ABD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABD	1	1	1	1	1	1	1	1	1	1	1	1
16		Validation Leader 02	"...superheros..."	Programme delivery	Authority & connectivity	VL02-012	VL02-012-ABCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCDE	1	1	1	1	1	1	1	1	1	1	1	1
17		Validation Leader 02	"unaccountable"	Programme delivery	Real world disconnect	VL02-013	VL02-013-ABCD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCD	1	1	1	1	1	1	1	1	1	1	1	1
18		Validation Leader 01	"...who is being assessed..."	Programme delivery	Authority & connectivity	VL01-014	VL01-014-ACD-1.2/1.4/1.5/2.3/2.4	ACD		1		1	1			1	1			
19		Validation Leader 01	"...cross of death... popularity contest..."	Programme delivery	Lack of credulity & realism	VL01-015	VL01-015-ABCD-1.2/1.4/1.5/2.3/2.4	ABCD		1		1	1			1	1			
20		Validation Leader 01	"entertaining but not really challenging"	Programme delivery	Lack of credulity & realism	VL01-016	VL01-016-ABCD-1.2/1.3/1.4/1.5/2.3/2.4	ABCD		1	1	1	1			1	1			
21		Validation Leader 01	"...trying to convince us, but doesn't land..."	Programme delivery	Lack of credulity & realism	VL01-017	VL01-017-ABCD-1.2/1.3/1.4/1.5/2.3/2.4	ABCD		1	1	1	1			1	1			
22		Validation Leader 01	"...no, little appreciation for reality..."	Programme delivery/context	Lack of credulity & realism	VL01-018	VL01-018-ABCD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCD	1	1	1	1	1	1	1	1	1	1	1	1
23		Validation Leader 03	"...highly variable context..."	Programme delivery/context	Real world disconnect	VL03-019	VL03-019-ABCD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCD	1	1	1	1	1	1	1	1	1	1	1	1
24		Validation Leader 03	"...maybe a slight lack of respect... dismissive"	Programme delivery	Authority & connectivity	VL03-020	VL03-020-ABCD-1.2/1.3/1.4/2.3	ABCD		1	1	1				1				
25		Validation Leader 03	"...this stuff is obvious, so what?"	Programme delivery	Real world disconnect	VL03-021	VL03-021-ABCD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCD	1	1	1	1	1	1	1	1	1	1	1	1
26		Validation Leader 03	"...don't remember too much... if anything in fact!"	Programme delivery	Real world disconnect	VL03-022	VL03-022-ABCD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCD	1	1	1	1	1	1	1	1	1	1	1	1
27		Validation Leader 03	"...the training staff were not the high performers"	Programme delivery	Lack of credulity & realism	VL03-023	VL03-023-ABCD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCD	1	1	1	1	1	1	1	1	1	1	1	1
28		Validation Leader 01	"...most leadership development is on the job...not much at all"	Programme delivery	Real world disconnect	VL01-024	VL01-024-ABCD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.1/3.2/3.3	ABCD	1	1	1	1	1	1	1	1	1	1	1	1
29		Validation Leader 01	"...done on the job..."	Programme delivery/context	Real world disconnect	VL01-025	VL01-025-ABD-1.2/1.4/1.5/2.1/2.4	ABD		1		1	1	1			1			
30		Validation Leader 02	"...conflicts with business demands, makes it irrelevant"	Contextualisation	Real world disconnect	VL02-026	VL02-026-BD-1.2/1.5/2.1/2.2/2.3/2.4/3.2/3.3	BD		1			1	1	1	1	1		1	1
31		Validation Leader 02	"...it's an add-on..."	Contextualisation	Real world disconnect	VL02-027	VL02-027-BD-1.2/1.5/2.1/2.2/2.3/2.4/3.2/3.3	BD		1			1	1	1	1	1		1	1
32		Validation Leader 02	"...timeless lessons..."	Contextualisation	Real world disconnect	VL02-028	VL02-028-BD-1.2/1.5/2.1/2.2/2.3/2.4/3.2/3.3	BD		1			1	1	1	1	1		1	1
33		Validation Leader 02	"...but it's more about management in fact..."	Contextualisation	Real world disconnect	VL02-029	VL02-029-ABD-1.2/1.4/1.5/2.1/2.2/2.3/2.4/3.2/3.3	ABD		1		1	1	1	1	1	1		1	1
34		Validation Leader 02	"...applying this is career suicide..."	Contextualisation	Real world disconnect	VL02-030	VL02-030-BCDE-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.2	BCDE		1	1	1	1	1	1	1	1		1	
35		Validation Leader 02	"...context is not important..."	Contextualisation	Real world disconnect	VL02-031	VL02-031-BCDE-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.2	BCDE		1	1	1	1	1	1	1	1		1	
36		Validation Leader 01	"...impossible or unwilling to recreate..."	Contextualisation	Real world disconnect	VL01-032	VL01-032-BCDE-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.2	BCDE		1	1	1	1	1	1	1	1		1	
37		Validation Leader 03	"...they don't get context..."	Contextualisation	Real world disconnect	VL03-033	VL03-033-BCDE-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.2	BCDE		1	1	1	1	1	1	1	1		1	
38		Validation Leader 03	"...case studies discussed, but nothing of how to then do..."	Contextualisation	Real world disconnect	VL03-034	VL03-034-BCDE-1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.2	BCDE		1	1	1	1	1	1	1	1		1	
39		Validation Leader 01	"...virtually nil..."	Performance feedback	Avoiding criticism	VL03-0340	VL03-0340-ACD-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4	ACD	1	1	1	1	1	1	1	1	1			
40		Validation Leader 02	"...everyone is scared to tell the truth"	Performance feedback	Discomfort & criticism	VL02-035	VL02-035-ACDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4	ACDE	1	1	1	1	1	1	1	1	1			1
41		Validation Leader 02	"...masquerade performance..."	Performance feedback	Discomfort & criticism	VL02-036	VL02-036-ACDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.3	ACDE	1	1	1	1	1	1	1	1	1			1
42		Validation Leader 02	"...polite and civil..."	Performance feedback	Avoiding criticism	VL02-037	VL02-037-ACDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4	ACDE	1	1	1	1	1	1	1	1	1			
43		Validation Leader 02	"...made to feel sun shines out of your ass..."	Performance feedback	Avoiding criticism	VL02-038	VL02-038-ACDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4	ACDE	1	1	1	1	1	1	1	1	1			
44		Validation Leader 02	"...trainer nervousness..."	Performance feedback	Discomfort & criticism	VL02-039	VL02-039-ABC-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.3	ABC	1	1	1	1	1	1	1	1	1			1
45		Validation Leader 02	"...much less room for delusion in the military...public brutal scuting"	Performance feedback	Discomfort & challenge	VL02-040	VL02-040-ABCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4/3.3	ABCDE	1	1	1	1	1	1	1	1	1			1
46		Validation Leader 03	"change or die"	Performance feedback	Discomfort & challenge	VL03-041	VL03-041-ABCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4	ABCDE	1	1	1	1	1	1	1	1	1			
47		Validation Leader 03	"...it's good for you...without doubt..."	Performance feedback	Unifying purpose	VL03-042	VL03-042-ABCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4	ABCDE	1	1	1	1	1	1	1	1	1			
48		Validation Leader 03	"...quality rose up..."	Performance feedback	Unifying purpose	VL03-043	VL03-043-ABCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4	ABCDE	1	1	1	1	1	1	1	1	1			
49		Validation Leader 03	"...lasts forever..."	Performance feedback	Unifying purpose	VL03-044	VL03-044-ABCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4	ABCDE	1	1	1	1	1	1	1	1	1			
50		Validation Leader 03	"...my whole view on life change... like a new lense..."	Performance feedback	Unifying purpose	VL03-045	VL03-045-ABCDE-1.1/1.2/1.3/1.4/1.5/2.1/2.2/2.3/2.4	ABCDE	1	1	1	1	1	1	1	1	1			
51		Validation Leader 01	"...subject matter stuff is the most important..."	Programme impact	Technocentric	VL01-046	VL01-046-BDE-1.1/1.2/1.3/1.5/2.2/2.3/2.4/3.1/3.2/3.3	BDE	1	1	1		1		1	1		1	1	1
52		Validation Leader 02	"...done in isolation, little coordination with other training"	Programme impact	Social disconnect	VL02-047	VL02-047-ABCDE-1.1/1.2/1.3/1.5/2.2/2.3/3.1/3.2/3.3	ABCDE	1	1	1		1		1	1		1	1	1
53		Validation Leader 01	"...all about the individual, not the team..."	Programme impact	Egoistic agenda	VL01-048	VL01-048-BCDE-1.1/1.2/1.3/1.4/1.5/2.2/2.3/3.1/3.2/3.3	BCDE	1	1	1	1	1		1	1		1	1	1
54		Validation Leader 01	"...it's a PDP exercise...personal gratification..."	Programme impact	Egoistic agenda	VL01-049	VL01-049-BCDE-1.1/1.2/1.3/1.4/1.5/2.2/2.3/3.1/3.2/3.3	BCDE	1	1	1	1	1		1	1		1	1	1
55		Validation Leader 01	"...make you better, more employable...better CV..."	Programme impact	Egoistic agenda	VL01-050	VL01-050-BCDE-1.1/1.2/1.3/1.4/1.5/2.2/2.3/3.1/3.2/3.3	BCDE	1	1	1	1	1		1	1		1	1	1
56		Validation Leader 01	"...whets appetite for something different..."	Programme impact	Social disconnect	VL01-051	VL01-051-ABCDE-1.1/1.2/1.3/1.5/2.2/2.3/2.4/3.1/3.2/3.3	ABCDE	1	1	1		1		1	1	1	1	1	1
57		Validation Leader 01	"...organisation (values) doesn't connect with the heart, the impact is	Programme impact	Values-authenticity-impact	VL01-0510	VL01-0510-ABCDE-1.1/1.2/1.3/1.5/2.2/2.3/2.4/3.1/3.2/3.3	ABCDE	1	1	1		1		1	1	1	1	1	1
58		Validation Leader 03	"...not enough... lucky to get any..."	Programme impact	Insufficiency	VL03-052	VL03-052-ABCDE-1.1/1.2/1.3/1.5/2.2/2.3/3.1/3.2/3.3	ABCDE	1	1	1		1		1	1		1	1	1
59		Validation Leader 01	"...zero impact on the organisation... not measured..."	Programme impact	Egoistic agenda	VL01-053	VL01-053-ABCDE-1.1/1.2/1.3/1.4/1.5/2.2/2.3/2.4/3.1/3.2/3.3	ABCDE	1	1	1	1	1		1	1	1	1	1	1
60		Validation Leader 01	...PR exercise for customers...doing the job...	Values integration	Inauthenticity	VL01-054	VL01-054-BDE-1.1/1.2/1.3/1.4/1.5/2.2/2.3/3.1/3.2/3.3	BDE	1	1	1	1	1		1	1		1	1	1
61		Validation Leader 02	"...values are corporate wallpaper...for shareholders..."	Values integration	Inauthenticity	VL02-055	VL02-055-BDE-1.1/1.2/1.3/1.4/1.5/2.2/2.3/3.1/3.2/3.3	BDE	1	1	1	1	1		1	1		1	1	1

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