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ABSTRACT

The Expedition Leader Style Analysis (ELSA) is an inventory designed to measure leadership style adaptability and effectiveness in terms of the situational leadership model. Situational leadership arose from the Experiential Leadership Education model, which is used in business and management, by replacing management jargon and phrases with outdoor terminology. The key to the leader style selection in situational leadership is to assess the maturity or readiness of the followers, then choose a corresponding style from "telling," "selling," "participating," or "delegating." Situational leadership integrates both task and relationship components and corresponds well with group development theory, which makes it ideal for use with expeditions. The ELSA instrument, which is presented in its entirety, consists of 12 situations, each having 4 alternative decisions, representing the 4 different leadership styles used in situational leadership theory, telling, selling, participating, and delegating. The respondent is directed to select the most appropriate response for the four alternative choices. This selection results in scores in each of the different styles. The ELSA inventory enables students to see which of their leadership styles need practice and which need to be used less. In a training session, inventory results are good starting points for discussion about how to make the decision or what style to use by targeting the readiness of the group. The ELSA is valuable in educating outdoor leaders and can also be used to show changes in dominant and supporting styles after some practice. (TD)

Using The Expedition Leader Style Analysis

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Abstract

The Expedition Leader Style Analysis is an inventory designed to measure the use of leader styles using the Situational Leadership™ theory. The inventory acts as a 'Johari Window' in that it illustrates dominant and supportive styles. This enables one to practice 'uncomfortable' styles as their 'non-use' is also illustrated by the scoring of the instrument.

The ELSA has been tested for reliability and validity using a Delphi process, Chi-square with the contingency coefficients, r^2, and Point Biserial Correlation Coefficients. The Delphi process was used at a National Experiential Education Conference, the validity studies were completed with outdoor leaders and business leaders, and the reliability studies were completed with college students. The ELSA was also used in a study completed by a researcher from the NASA-Ames Research Center at Moffat Field CA.

ELSA is an instrument that enables measurement of leader styles in an outdoor situation and as such is a valuable training tool.

Introduction

During the past few years different theories of leadership have been used in outdoor leadership training one of which is Situational Leadership™ (Ford & Blanchard, 1993). The key to the leader style selection in this theory is to assess the maturity (or readiness) of the follower(s), then choose a corresponding style from "telling," "selling," "participating," or "delegating." Situational Leadership is a life-cycle theory which integrates both task and relationship components (Hersey & Blanchard, 1996) and corresponds well with group development theory (Phipps, 1986). This makes the theory ideal for use with expeditions. Because outdoor groups are currently using this theory (Cockrell, 1991; Drury & Bonney, 1992), there is a need for an inventory to measure and illustrate the different styles for leaders using Situational Leadership.

The need for an inventory arose during the testing of the Experiential Leadership Education (ELE) systematic method to teach leadership (Phipps, 1986 and Phipps and Swiderski, 1991). A management-oriented inventory had been used in that study which included management jargon and phrases unrelated to outdoor pursuits. Therefore an inventory using outdoor terminology and situations was needed. Because of this need, Phipps and Phipps (1987) developed the Expedition Leader Style Analysis (ELSA).

Irwin, a researcher from the NASA-Ames Research Center attended an expedition style leadership training course using the ELSA and made the following comments about the inventory :

> Use of the ELSA inventory gave the students a chance to objectively evaluate their own personal decision-making and identify their own dominant or preferred style. Many training programs, management, team-building and outdoor programs as well, apply some means of evaluating personal management or leadership style through the use of a variety of management and personality indices. The importance of the exercise is to show that

> individuals differ in their personal styles and that certain styles are more appropriate in certain situations. One favorable aspect of the ELSA inventory is that it is designed specifically for use in outdoor education, so students are not forced to make real-world translations from management terminology. All the situations and terminology are familiar to the student, so the information is more readily processed and applied in later situations. (Irwin and Phipps, 1994 p. 49)

Subsequently, Grube, Phipps, and Grube (2002) used the ELSA in a single case research project that stressed using a journal technique to enable students to practice using different styles. An illustration of the students' comfortable and uncomfortable styles enables the instructor to discuss the usage of the styles in a field journal. A pie chart showing the results of the ELSA can be colored in the journal to correspond with the Situational Leadership™ colors (telling = green, selling = orange, participating = blue, and delegating = pink), so biases can be checked before discussion with the student.

The ELSA, then, enables an illustration of dominant (or comfortable) and supporting styles but also uncomfortable styles. The uncomfortable styles need to be practiced as Situational Leadership™ recommends that as leaders we change our style to fit follower readiness levels. Knowing any biases, the leader trainer can encourage the use of all styles when students are actually leading and when they document decisions in their leader decision journals.

Description of Instrument

ELSA purports to measure leadership style adaptability and effectiveness in terms of the Situational Leadership™ model. Situational Leadership™ is based upon the interaction of task behavior and relationship behavior with the readiness level of the follower(s). Figure 1. shows an illustration of the Situation Leadership™ model. As the readiness level of one's followers develop, the appropriate style of leadership changes to match the actual readiness level.

Figure 1. Situational Leadership™ Model.

Readiness Level:	R1	R2	R3	R4
Corresponding Style:	Telling	Sell	Participate	Delegate

Situational Leadership Quadrants:

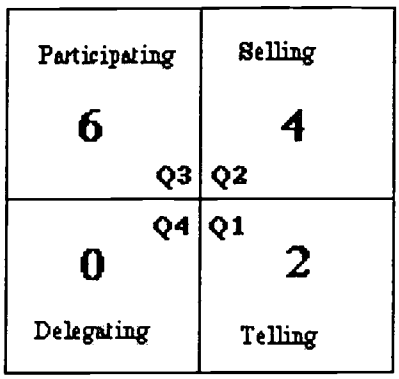
Q3 Participating	Q2 Selling
Q4 Delegating	Q1 Telling

R4	**R3**	**R2**	**R1**

ELSA consists of twelve situations, each having four alternative decisions, representing the four different leadership styles used in Situational Leadership™ theory (telling, selling, participating, and delegating). The respondent is directed to select the most appropriate response of the four alternative choices. This selection results in scores in each of the different styles. These are noted in the four quadrants of a box (see figure 2) that represents the underlay of the Situational Leadership model in Fig 1.

Fig. 2 **Quadrants Illustrating the Dominant and Supporting Styles**

Example



The dominant style for this leader is 'participating'.the supporting style is 'selling'. Practice is needed in 'telling' and 'delegating'.

Q= Quadrant

With the most correct answers, the scores in each quadrant should be balanced and there would be 3 in each quadrant. The number in the quadrant illustrates the extent to which the instructor uses a particular style. If no delegating styles for example were selected then in quadrant 4 there would be a zero or if there was an overuse of selling, there would be a number higher than 3 in quadrant two. The numbers then illustrate the respondents' dominant and supporting styles. These are then drawn on a pie chart on the score sheet to show the balance of styles. Figure 3 shows the complete score sheet. As there is a range of effectiveness, the score sheet shows whether the selection is the best or where ineffective styles are being used. Each alternative answer other than the best one shows a subscript identifying the quadrant used for that selection. The respondent is then asked to reconsider choices of style in relation to follower readiness and style range in the pie chart and quadrants mentioned above.

Each situation is designed to reveal a level of 'readiness' in the group from which the leader can make a judgment as to what style is most appropriate for the situation. If judgments are made from a personal bias rather than from an educated perspective - then one's preferred, or in Hersey & Blanchard's (1982) terms, dominant (and supporting) styles are illustrated when the instrument is scored. It would be expected that personal bias would be used by students when the instrument is used for teaching purposes prior to leadership education. Therefore, as one's dominant leader style is revealed, this knowledge enables the practice of alternate styles that might be more appropriate for the followers and the situation in question.

Figure 3.
ELSA SCORESHEET
(Copies of the ELSA inventory and score sheet are available from Maurice Phipps at Western Carolina University)

Development and testing of the instrument

The ELSA manual (Phipps et al, 2002) describes in detail the instrument, its development by Phipps and Phipps (1987 and 1992) and testing by Ballard (1989) and Mann (1992). The original version of ELSA was presented at the 1986 National

Experiential Education Conference in Port Townsend. Part of the workshop involved using a modified Delphi technique to identify disagreements in the alternate decisions offered in ELSA. Feedback was also given regarding the wording of questions, answers, and terminology in general. The original inventory was then modified with the suggested corrections. The questions were intentionally designed to be general by nature.

A study was completed by Ballard (1989), using outdoor leaders and business leaders trained in Situational Leadership™ to test the validity of ELSA. Point biserial correlation coefficients (*rpb*'s) were computed showing that of the 12 situations and corresponding correct answers, 9 coefficients were significant beyond the .01 level and three were significant at the .05 level. Each of the options produced a selection rate of less than 80% (this criterion was to ensure a discriminating test). The logical or face validity was established by reviewing the inventory at the National Experiential Education conference using the modified Delphi procedure. Leader-centered scores for the outdoor leaders and business leaders were also compared using a t-test as it was a consideration that the business leaders reading outdoor situations might be more leader-centered. There was no significant difference between the two groups.

Another study was completed by Mann (1992) using college students to test the reliability of ELSA. Chi-square with the contingency coefficient was used to measure the dominant style and alternate style scores' correlations and r^2 was used to measure the effectiveness scores' test, re-test correlations. The dominant style and alternate style scores remained relatively stable across time ($c = .62651$, $p < .01$ and $c = .77994$, $p < .01$ respectively). The "total" effectiveness scores in this study (using +2, +1 or -1, -2 to score choices) proved to be unstable across time probably because the instrument has only 12 questions.

The instrument can best be used as a training instrument as the *rpb* coefficients showed the highest correlations with the 'best choice' item in each situation giving the instrument validity in all the 12 situations. Changes in dominant and supporting styles can also be safely measured over time.

The Expedition Style Analysis Inventory (ELSA)

In the following twelve situations, assume that you are the leader or are assuming the leadership of the group. Following each situation are four possible actions that you might initiate. Choose which decision you would most closely describe YOUR behavior in the situation presented. Circle <u>only one choice.</u> The group is a task-oriented group. In selecting the answers, stay with the same kind of group in your mind to enable consistency in your answers throughout the inventory.

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1. You have been initiating friendly conversation and showing concern for the group as individuals. Their performance is declining rapidly. YOU WOULD...

A. Discuss the goals and importance of task completion.

B. Wait for the group to formulate a solution and be prepared to give them direction.

C. Talk over the problem with the group and set goals for them.

D. Allow the group to carry on without interference.

---

2. Your group is working efficiently, in fact they are doing considerably better than previous days and you need to meet deadlines. You have been checking individuals so that they understand what is expected of them. YOU WOULD...

A. Show camaraderie and continue to check of that individuals understand what is expected.

B. Leave the situation alone, taking no action.

C. Take steps to enhance feelings belonging and importance.

D. Stress time limits with regard to what needs to be done.

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3. An issue has arisen in the group concerning which geographic direction to take. They don't seem to be able to resolve this problem. The group has been functioning well and everyone has been getting on well together. Previously you have not interfered. YOU WOULD...

A. Explain to the group which way to go and why.

B. Leave it to the group to resolve.

C. Immediately guide the group using a firm manner.

D. Problem solve with the group.

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4. Because of extra difficult terrain and time restraints, you are considering a change in the expedition plan. The group is extremely capable and gave been functioning well. They accept that the plans need to be modified. YOU WOULD...

A. Talk over the alternative plans but be as non-directive as you can.

B. Make a new plan and make sure the group follows it.

C. Let the group decide what to do

D. Encourage input from the group, but you choose and implement the change.

---

5. During the final stages of the expedition, many of the goals haven't been achieved. Previously reminding the group on a continual basis about specific objectives has been effective. They have been acting unconcerned. YOU WOULD...

A. Leave it to the group to work out the problem.

B. Encourage input from the group, but make sure that you achieve some goals.

C. Discuss the goals again and what is expected. Be directive.

D. Explain that you want group involvement.

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6. The authoritative leader of the expedition has been evacuated, leaving you in charge. You are half way through the expedition. The expedition is functioning effectively. Without losing control of the group, you would like to create a more open communication climate. YOU WOULD...

A. Enhance the group's self-esteem.

B. Keep the focus on time lines and goals.

C. Do nothing and allow the group to continue on its own.

D. Ask for more group input but make sure the expedition objectives are met.

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7. You are in the final stages of your expedition. You are thinking of making a change of plan. Members of the group have suggested a change of plan. The group responds well to trying different alternatives and they are fairly experienced expeditioners. YOU WOULD...

A. Decide and organize the change yourself.

B. Use a participatory style in deciding the change, but allow the group to execute the plan.

C. Be open to suggestions, but retain the authority to execute the plan.

D. Let the group make the change of plan.

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8. The group understands the responsibilities and members are showing good capabilities. There is a high-level of camaraderie in the group. You are concerned about your own seemingly lack of direction. YOU WOULD...

A. Leave them alone.

B. After getting input from the group, initiate changes that you think are necessary.

C. Obtain tighter control by restructuring procedures.

D. Discuss the situation with your group but give as little direction as possible.

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9. Expedition Behavior in the group (group norms - expected behaviors) is extremely unsatisfactory. The group has been together a very short time. Goals are not clear and cliques are developing. YOU WOULD...

A. Leave it to the group.

B. Ask for input from the group, but push to meet objectives.

C. Discuss the goals and be directive.

D. Involve the group in goal setting, but be non-directive.

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10. The punctuality standards on your expedition have been declining. Even though your group normally demonstrates responsibility, they are not reacting to your directions regarding these standards. YOU WOULD...

A. Encourage the group to discuss the standards.

B. Refresh the group about the standards and enforce them.

C. Do not push the issue at this time.

D. Ask for input from the group, but ensure that the standards are followed.

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11. The leader, who allowed the group to perform on its own, has been incapacitated and has asked you to assume direction of the group. Relationships in the group are good and goals are being met but only adequately. YOU WOULD...

A. Be directive and define goals and objectives.

B. Solicit input from the group members and support quality input.

C. Call a meeting to examine past accomplishments, then you determine whether a change is needed.

D. Continue to allow the group to perform on its own.

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12. The group has become aware of an interpersonal conflict. Until this time the group has maintained high morale, and they are highly mature expeditioners and understand interpersonal relationships and group dynamics. YOU WOULD...

A. Identify the problem for the group, then suggest what they should do.

B. Leave the group to work it out.

C. Take steps to correct the situation quickly by directing the group.

D. Be supportive and participate with the group in finding a solution.

Conclusion

To enable someone to monitor their own leadership it is essential to understand one's preferential styles so that 'uncomfortable' styles can be practiced. Often a situation may demand the use of a certain, but uncomfortable, style because of interpersonal dynamics and because of issues related to the group's safety (both of which may be interacting) (Irwin and Phipps, 1994). The ELSA inventory acts as a 'Johari Window ' to enable students to 'see' hidden aspects of their leadership. Once revealed, the styles that need practice and the styles that need to be used less can be developed. In a training session, the balance of styles shown in the quadrants, and the pie chart are good starting points for discussion about how to make the decision or what style to use by targeting the readiness of the group (their ability and willingness to perform the task in any given situation). The ELSA then is a valuable tool and measurement instrument to educate students in this regard. It can also be used to show changes in dominant and supporting styles after some practice.[1]

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[1] Copies of the ELSA inventory and score sheet are available from Maurice Phipps at Western Carolina University

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