

UNDERSTANDING LEADERSHIP THEORY: THE DOCUMENTARY OF SIR ERNEST SHACKLETON

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ABSTRACT

Leadership theory is one of the most complex groups of theories to teach management students; nevertheless, it is the one of the most interesting and often desired topics to learn from students. Many organizations are seeking soft skills that are commonly discussed in leadership theory such as building relationships with followers, taking initiative and having effective communication skills (Abraham & Karns, 2009; Graduate Management Admissions Council [GMAC], 2012; Loman, 2011). This paper describes the experiential exercise in which the documentary of a historical figure, Sir Ernest Shackleton, is used to facilitate a discussion on the many aspects of leadership (Butler, 2000). Results from a student satisfaction survey of this exercise and pre-test/post-test data are provided to indicate learning in this exercise.

INTRODUCTION

A fundamental topic in management relates to understanding effective leadership and developing leaders within an organization. In fact, the topic of leadership quite often becomes a history lesson explaining the evolution of multiple theories and the complexity related to understanding how leadership works in our world. Leadership could not be discussed without considering the political, societal and/or organizational implications of prominent leaders over time. Moreover, we can learn through historical figures the art of leadership and how effective leadership can lead to positive outcomes. Many graduate students pursue a degree with the intent of becoming effective leaders in the workplace and expect to learn the art of leadership in our curriculum.

One of the major challenges for MBA programs is to provide knowledge and practical skills of leadership in the curriculum. Recently, some researchers have argued to redefine leadership and to focus more on process-related behaviors related to leadership and to place less emphasis on a systems-perspective for leadership (Hay and Hodgkinson, 2006). Meaning, leadership should include the process as well as an understanding of the constantly changing environment. The purpose of this paper is to provide an experiential exercise based the documentary of one historical figure, Sir Ernest Shackleton, and to describe how this exercise can be integrated into a MBA level course teaching leadership. Specifically, this exercise

focuses on a historical event in which the leader worked with his followers in an extreme situation and constantly changing environment. The exercise integrates the students' knowledge of leadership theory within the last century to understand the complexities of effective leadership in a dynamic environment.

LEADERSHIP THEORIES

Leadership theories are often grouped into multiple categories in organizational behavior classes: trait theories, behavioral theories, contingency theories and contemporary theories of leadership (Bryman, 1996; Hay and Hodgkinson, 2006). Teaching leadership within an undergraduate or graduate organizational behavior course can be challenging as there are so many different models, theories and perspectives due to the number of years it has been researched. Additionally, due to the complex nature of leadership, it becomes almost necessary to provide a historical perspective of the different approaches to understand the evolution of leadership theory. Hence, in many organizational behavior classes, leadership lectures always start with a historical overview of how we have progressed in understanding the many different dynamics of leadership theory. Once the evolution of leadership theory is explained, then exercises such as the Shackleton documentary (Butler, 2000) described in this experiential exercise and/or case studies can be used to reinforce the leadership models discussed.

Trait theories are often discussed first in a leadership discussion as it addresses our interest in understanding the personality traits relevant to highly effective leaders. Early management theorists questioned whether personality traits, physical characteristics and abilities were predictive of highly effective leaders (Bryman, 1996). During this time period, researchers questioned whether leaders are born and therefore distinguished among ineffective leaders. This discussion often leads to a lively interaction in which students discuss the 'nature or nurture' debate in effective leaders but also addresses whether leadership behaviors can be developed over time.

There is a natural transition to our discussion of behavioral theories after our trait theory discussion as students quickly realize the importance of how leaders behave in understanding effective leadership. More specifically, the behavioral theories, based in the Ohio Studies research lead by Stogdill, identified two prominent behavioral dimensions: consideration and initiating structure (Bryman, 1992). The consideration behavior focuses on building relationships with followers in order to attain goals; whereas, the initiating structure behavioral style focuses on tasks. By understanding these early research models, students can quickly identify with the concept of exhibiting either task-oriented or people-oriented behaviors in relation to effective leadership. Moreover, these models emphasize the importance of how leaders interact with their followers in order to meet specific goals.

Next, our discussion continues with the contingency models in which context and moderators become pivotal components in understanding effective leadership. The lecture builds upon previous models but also discusses the inefficiencies and inconsistencies of the trait and behavioral models. Many textbooks emphasize the Situational Leadership Model or Life Cycle theory of Leadership developed by Hersey and Blanchard (1969) as a prominent contingency model. This model provides a good example of how specific behaviors need to match a particular context in order to maximize performance among followers. Students quickly recognize the importance of adapting leadership behaviors to a specific context.

The last category of leadership models is often called the contemporary models in which we often discuss transactional, charismatic and transformational leadership. In the classroom, we spend a considerable amount of time discussing the similarities and differences in these models as well as how leadership has progressed to this point in time. Additionally, students often provide personal and public examples of these types of leaders. Teaching leadership from a historical viewpoint allows students to see multiple perspectives and complexities in evaluating effective leadership.

MULTIPLE TECHNIQUES FOR TEACHING LEADERSHIP

There have been numerous articles discussing the challenges of teaching leadership and authors have provided multiple techniques for teaching leadership (e.g., Bumpus, 2005; Burns, 2000; Doh, 2003; Harrington & Griffin, 1990; Hay & Hodgkinson, 2006; Podolny, 2011). Specifically, authors have used motion pictures, poetry/classic literature, and many other experiential techniques to teach the complex leadership theories. Increasingly, educators have incorporated more visual learning techniques such as television and movies clips into the classroom because it provides an effective stimulus to learning by engaging students and illustrating course concepts (Bumpus, 2005; Smith, 2009). Discussing Leadership theory without demonstrating these behaviors could be a challenge and prevent an optimal learning experience for our students. In other words, lectures related to these topics can be confusing and tedious as they are often explained from a historical perspective. Therefore, finding different ways to present the numerous models in leadership assists students in their overall learning (Anderson, 2007; Marcketti & Kadolph, 2010).

Leadership Exercise

Sir Ernest Shackleton (1874-1922) was a British explorer most famous for his *Endurance* expedition to Antarctica (Larson, 2011). Shackleton joined the merchant navy at an early age and become obsessed with reaching Antarctica after he was forced to return home due to an illness on his way to Antarctica. In 1914, his ship, *Endurance*, sailed for his third trip to the South Pole. This famous trip is discussed in the documentary, "The *Endurance*: Shackleton's legendary Antarctic Expedition" (Butler, 2000). The *Endurance* became trapped in ice and the crew members were stuck on ice for 635 days. This incredible journey illustrates the stressful excursion and survival of all 28 members in his crew. More specifically, the crew was forced to abandon the *Endurance* after it was trapped in ice. Shackleton and his crew used three small boats to travel to Elephant Island, an uninhabited island off the coast of Antarctica. Although the crew was on land, there was little chance of being rescued from this remote island. Therefore, Shackleton and five members of his crew continued their trek to reach another island sixteen days later. On foot, Shackleton reached a whaling station after thirty-six hours and was able to organize a rescue mission for the remaining men on Elephant Island. Amazingly, all twenty-eight crew members survived this miraculous expedition in the Antarctic.

The documentary is presented after a thorough lecture of leadership theory and discussion of the common categories of leadership theory. The documentary is shown in the beginning of a 3-hour graduate-level class and then a discussion begins relating Shackleton's expedition with leadership theory. Butler's documentary (2000) won awards at the Sundance Film Festival and Telluride Film Festival. It is narrated by Liam Neeson and uses pictures and historical footage from the actual location. Additionally, the documentary includes interviews with surviving relatives as well as archived audio interviews with members of the crew. The documentary is 97 minutes in length which is suitable for a graduate level class that typically meets for 3 hours once a week.

An advantage to using movies/documentaries as a method for reinforcing learning is that it provides a visual image for transferring the knowledge learned in lectures to an example (Bumpus, 2005; Harrington & Griffin, 1990). Students are encouraged to take notes during the documentary and look for examples of the various leadership theories/models we discuss in our lecture. They are informed of the discussion in advance of the viewing in which they will be required to participate and provide examples from the documentary. After viewing the documentary, the instructor facilitates a thorough discussion of each of the leadership categories and illustrates how each of the models may apply to Shackleton and his crew. An alternative would be to break the class into small groups and to instruct each group to focus on a leadership category (i.e., trait theory, behavioral theories, etc.). Within each group, students would be required to provide examples of Shackleton and/or his crew as they relate to each of the leadership models/theories in their respective categories. Once the groups have completed this initial assignment, then the groups could facilitate and lead the discussion with the remaining students.

There are numerous situations within the documentary in which students could relate the historical events to leadership concepts. For instance, the documentary discusses the 'job wanted' ad posted when Shackleton was searching for crew members. The ad stated, "Notice: Men wanted for hazardous journey. Small wages. Bitter cold. Long months of complete darkness. Constant danger. Safe return doubtful. Honour and recognition in case of success." Part of our leadership lecture focuses on the follower characteristics and some of the contingency models include followers as part of leader effectiveness. The job wanted posting by Shackleton provides a unique opportunity to integrate many of these leadership topics from the followers' perspective as well as tie concepts to the Situational Leadership Model (Hersey & Blanchard, 1969). Within this documentary, there are several examples of leadership models/theories exhibited by either Shackleton

or his crew members during this historic journey. The instructor/facilitator could simply identify specific models/theories in leadership and ask the students to provide examples of these behaviors in which Shackleton or his crew exhibited.

Leadership Exercise Evaluation

The leadership exercise has been successfully implemented in a graduate level Organizational Behavior course and a graduate level Leadership course in a large, public university located in the southeast United States. All of the students taking this course are pursuing a Master's degree in Business Administration. Most students in the course have a minimum of five years of industry experience prior to pursuing an advanced degree. Additionally, only 14% of the students have supervisory experience; nevertheless, most students expressed a desire to move into leadership positions within their own organization.

Data was collected to determine if the leadership exercise improved learning in the traditional leadership theories taught in the course. Prior to our class lecture/discussion on leadership, students were asked to complete a 20-question pretest to determine a base-level of knowledge for understanding general leadership concepts. A posttest was distributed in the class following the viewing of the documentary and class discussion related to the documentary. Additional survey items were included in the posttest and related to student satisfaction with the video exercise. The additional questions were related to the relevance of the video technique for teaching leadership and less emphasis was placed on understanding concepts which were more likely to be tested in class exams for leadership.

Forty-five students completed both the pretest and posttest for the leadership exercise. The average score for the pretest is 11.2 out of 20 questions and the average score for the posttest is 14.7 out of 20 questions. A paired sample t-test was used to analyze the difference in scores between the pretest and posttest. A statistically significant increase occurred in learning from the pretest to the posttest ($t = -5.425, p = .001$).

Students were also asked a series of questions related to their general satisfaction with the assignment and usefulness of the video exercise. Seven questions were added to the posttest that addressed whether the video exercise was a useful tool for learning leadership theories. The items were evaluated using a 1 to 7 scale from strongly disagree to strongly agree. The means for each of these additional survey questions are provided in Table 1. Overall, the class appeared highly satisfied with the expectations and objectives of the leadership video exercise.

Survey questions		Mean
1	This exercise was relevant to learning leadership theory.	5.23
2	This exercise was interesting.	5.05
3	This activity reinforced and complemented what I learned about leadership theory.	5.12
4	Watching a video about a real-life leadership situation was very helpful in learning leadership.	5.52
5	This activity helped bring to life what happens between leaders and followers.	5.34
6	Please comment on what you liked about this exercise.	
7	Please comment on what you disliked about this exercise.	

Many students provided additional comments regarding what they liked or disliked about the video exercise. Students commented about the ability to apply multiple leadership concepts within the story of Shackleton. Also, students appreciated the real-life example of a leader in dire situations often commenting about the context in which these leadership theories were demonstrated. Lastly, many students commented about the value of observing these leadership theories in practice and not just learning the ideas/concepts related to these theories. Overall, students enjoyed learning more about this historic expedition in which most students were unfamiliar with this particular journey to Antarctica.

A few students also provided comments about what they disliked in this particular exercise. Specifically, some students commented about the length of the documentary and that they had wished it was shorter in length. Some students noted that the documentary was interesting from a historical perspective but would have liked a more current example of leadership in practice. Nevertheless, most students were more favorable than negative with the comments and the overall video experience.

CONCLUSION

Although some researchers argue we need to redefine how we teach leadership (e.g., Bumpus, 2005; Burns, 2000; Harrington & Griffin, 1990; Hay & Hodgkinson, 2006), there are multiple techniques and strategies that instructors can use to facilitate learning leadership concepts for our students. Leadership continues to be one of the most desired topics to learn within a graduate degree.

However, engaging students to learn leadership from a historical perspective as well as how it can be applied in their everyday work life is an incredible challenge (Burke & Moore, 2003). Corporations are concerned about the lack of 'people skills' within recent graduates and there is a higher awareness in students to develop these managerial skills which will make them successful in the workforce. Employers want employees who are capable of utilizing many leadership skills that highlight understanding human behavior and getting the job done (e.g., Association of American Colleges & Universities [AACU], 2015; GMAC, 2012; Selingo, 2015). Leadership theory and the ability to influence others are tied so closely to building relationships and people skills that corporations seek in new applicants. However, the complexity of understanding effective leadership also reinforces the need for meeting goals in a timely manner. Employers are more attracted to students who can demonstrate these leadership skills outside of the classroom and, recently, employers have emphasized the ability to learn as one of the most attractive qualities in a job candidate (Selingo, 2015). Therefore, using visual exercises to demonstrate leadership concepts becomes a priority in helping students learn and make connections with theoretical course concepts.

Movies and/or documentaries provide an additional method for reinforcing learning concepts in the classroom. This medium has the opportunity to bridge the gap between a student's learning environment and a real-world situation through film (Rajendran & Andrew, 2014). Films engage students more intensely and have a higher probability of leaving a lasting impression (Cardon, 2010). Meaning, films can provide an alternative method to understand complex theories and models to improve learning. Specifically, films can improve learning by being more memorable and entertaining to students in a classroom (Champoux, 1999). Although this documentary tells the story of an exceptional journey more than one-hundred years ago, many current leadership concepts can be applied and illustrated by the crew's survival in this strenuous expedition.

As with all research, there are limitations to consider. First, this experiential exercise is a time commitment to the overall class in that the video takes a substantial amount of time to view the documentary plus time to facilitate the discussion. This exercise is most suitable for a three-hour class in which you have ample time to discuss the documentary and leadership theories with students. Even though this exercise has been implemented in multiple graduate courses for years and there is a significant difference in the pre-test and post-test data indicating learning of these concepts, this exercise should continue to be monitored for overall effectiveness. The sample size is relatively small and should continue to be evaluated as

a useful tool in learning leadership theory. Additionally, many graduate students are interested in pursuing management positions during their careers; therefore, students are motivated to learn the concepts of leadership and how to apply them in their everyday work life.

Despite these limitations, this experiential exercise provides another method for instructors to teach leadership theory. As educators, we often look for varying methods to reinforce learning and provide variety in the classroom. Students appreciate the multiple methods for teaching and expect more integration and a higher level of learning than traditional lectures (Bumpus, 2005; Burns, 2000; Hay & Hodgkinson, 2006).

Lastly, by viewing the documentary in its entirety, students can become emotionally connected to the experience and engage more strongly in understanding the situation with leadership theory. Additionally, numerous advantages have been identified when using film to teach complex management concepts such as the ability to engage students, to provide a visual example of concepts and to bridge the gap between leadership concepts with real examples in practice (Ambrosini, Billsberry, & Collier, 2009; Liles, 2007; Rajendran & Andrew, 2014). This documentary provides an additional method for emphasizing leadership theory in practice. Moreover, students can learn how to recognize effective leadership behaviors which may be used in their own personal development as they progress in new careers.

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