# BLENDING CONSTRUCTS AND CONCEPTS: DEVELOPMENT OF EMERGING THEORIES OF ORGANIZATIONAL LEADERSHIP AND THEIR RELATIONSHIP TO LEADERSHIP PRACTICES FOR SOCIAL JUSTICE\*

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#### Abstract

This paper addresses and discusses traditional organizational leadership theories of the past and their relationship to more recent theoretical concepts and constructs of the present. Leadership theory is reviewed in an historical context and connections are made to current leadership literature and theory. The paper addresses how more recent theoretical concepts and identified leadership types provide a connection to organizational leadership and oversight supporting a culture of social justice in education and other organizational systems.

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# 2 Sumario en español

Este papel dirige y discute teorías organizativas tradicionales de liderazgo del pasado y su relación a conceptos y constructos teóricos más recientes del presente. La teoría del liderazgo es revisada en un contexto y las conexiones histórico son hechas a la literatura actual del liderazgo y la teoría. El papel dirige cómo conceptos teóricos más recientes y tipos identificados de liderazgo proporcionan una conexión al liderazgo y el descuido organizativos que apoyan una cultura de la justicia social en la educación y otros sistemas organizativos.

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#### 3 Introduction

Organizational leadership theory has evolved over the last century as a means to explain, predict and control decision-making and problem-solving in organizational contexts. Whether it is the great man theory, a trait, style, or skills approach, contingency or path-goal theory, situational or team leadership, these theories have been researched and tested over periods of time and their description provides frameworks for practice. The end of the 20<sup>th</sup> century and into the 21<sup>st</sup> century has introduced researchers, scholars, and practitioners to a variety of newer concepts such as ethical leadership, servant leadership, value-added leadership, cultural leadership, moral leadership, and ecological leadership (Hoy & Miskel, 2013; Northouse, 2013; Yukl, 2010). These recent concepts appear to be more of a blending of ideas and concepts interrelated between and building upon each other rather than singular theoretical frameworks based on empirical research.

The same as complex theoretical constructs provide guidance to every-day decision-making and problem-solving, the more recent leadership concepts are attempting to explain and provide guidance to organizational leaders in an effort to identify behaviors and styles that will meet the demands of defining emerging and changing societies and cultures. Concept labels such as moral, servant, value-added, ethical, and cultural leadership attempt to provide a guide or roadmap to wise and ethical decision-making in a complex and ever changing world. This demonstrates a process different than empirical research. Instead, scholars have chosen specific words and phrases to support newer ideas, develop names for leadership styles that mirror or blend with words and phrases used in current cultures, and at the same time making a connection with social science research. This connection links leadership theory and social science research, ultimately recognizing and addressing demands for social justice in the more permanent structures of society such as government and schools.

The review and discussion of traditional organizational theories of the past and making connections to more recent constructs and concepts of the present assist in understanding how these newer concepts relate to leadership and organizational oversight supporting a culture of social justice in schools and educational systems. A historiographic research methodology is used to form a platform and structure to review pertinent leadership studies that provide a background and foundation for making the connection between current theory and concepts of social justice.

#### 4 Historiographic Research

A form of historiographic research has been employed as a qualitative research methodology used to review the development of past and current theories and concepts applied to various types and definitions of leadership.

A review of the literature will aid in identifying methods employed to classify a specific leadership style as an established theory or as a construct or concept. Historiographic research entails a critical review of a specific topic in an effort to determine its importance and relationship to a present topic (Johnson & Christensen, 2008). This type of qualitative research, when compared to case studies (events) or ethnographies (cultures), has a strong potential for validity and rigor through the use of chronological sources of information, creating a narrative leading to a hypothesis (O'Brien, Remenyi, & Keaney, 2004). Two of the reasons presented by Berg (1998) for conducting historiographical research are to identify whether there is any relationship that the past has to the present, and to conduct a review of the past to aid in understanding a current culture. A review of the literature will aid in identifying methods employed to classify a specific leadership style as an established theory or as a construct or concept.

Given the fact that organizational management literature and theory of the early part of the 20<sup>th</sup> century provides a strong foundation for work addressing current educational administration/leadership theory, constructs, and concepts, the review will encompass both organizational management and educational leadership literature. The narrative will be developed through the assembly of the literature review, and the hypothesis will be developed in questioning the relevance of currently used descriptions of leadership to the applications of educational leadership behaviors as they relate to a culture addressing social justice.

It is important to note that not all of the leadership research reviewed would be considered empirical. Empirical research closely mirrors the scientific method and has long been the standard on which to base credibility of research outcomes and the development of resultant theories. The word empirical refers to information gained by experience, observation, or experiment and is closely aligned with the scientific method. The central theme in the scientific method is that all evidence must be empirical, meaning it is based on evidence. In the scientific method the word "empirical" refers to the use of a working hypothesis that can be tested using observation and experiment. The empirical cycle consists of following stages:

- 1. Observation collecting and organizing empirical facts to form an hypothesis
- 2. Induction the process of forming an hypothesis
- 3. Deduction Deduct consequences with newly gained empirical data
- 4. Testing Test the hypothesis with new empirical data
- 5. Evaluation Perform an evaluation of the outcome of testing. (Hani, 2009)

Smith (1993) in the book entitled, After the Demise of Empiricism: The Problem of Judging Social and Educational Inquiry, provides some insight into the movement of educational research away from demands for empirical studies and the problems that may be encountered when using observations, opinions, and personal knowledge as the basis for the development of theoretical constructs and concepts. Concepts based mainly on observations and ideas, rather than pure empirical research are more likely to be used in development of theoretical constructs, one idea building upon another, when employing qualitative research in studying and defining leadership. A concept is defined as, "a general notion or idea; an idea of something formed by mentally combining all its characteristics or particulars: a construct" (Random House, 1984, p. 278). A construct is defined as "a complex image or idea formed from a number of similar images or ideas" (Random House, 1984, p. 288). The Encarta English Language Dictionary further defines a construct as both a noun and a verb.

- 1. NOUN complicated idea consisting of several simpler ideas; A complicated idea created by making several simpler ideas fit together
- 2. VERB create something by making things fit together. To create something such as an idea or system by making various things fit together. (Encarta English Dictionary, 2012)

Field studies, descriptive and comparative studies, survey research, interviews, case studies, observations, laboratory experiments, factor analysis, theoretical-deductive, and statistical analysis have been the primary research methodologies used in leadership studies. More recent leadership studies combine field studies, observations, and literature reviews encompassing a broader scope of the social sciences, scaffolding of information, and research in the development of new constructs and concepts defining and explaining leadership.

# 5 Leadership Theory

Leadership theory has evolved over the past century and as a result a variety of leadership styles and approaches have been identified and defined. Rost (1991) writes that there have been over 200 definitions for leadership posited during the 20<sup>th</sup> century. That number is growing as scholars observe, identify, and promote the emergence of new leadership styles and behaviors of the 21 st century. A review of research reflects multiple behavioral taxonomies as demonstrated in the trait approach (Stogdill, 1948, 1981), style approach researched and identified in the Ohio State Leadership Studies (Blake & Mouton, 1985; Hempill & Coons, 1957), and in the development of the Leadership Behavior Description Questionnaire (LBDQ) along with subsequent forms of the questionnaire developed and additional scales added at later dates (Stogdill, Goode & Day, 1962). At approximately the same time, behavior approaches and identification of leader relationships and group processes were researched and tested in the Michigan Leadership Studies of the 1950s and 1960s (Katz & Kahn, 1952; Likert, 1961, 1967). Yukl (2010) provides an excellent review of leadership behavior taxonomies that have been developed over time (pp. 66-72). An example of scaffolding theoretical concepts is the power-influence approach which was presented by French & Raven (1959) and built upon and expanded by Pfeffer (1981). These theories were followed by studies that looked at the relationship of the leader to organizational members. These studies included the situational approach (Fiedler, 1967; Hersey & Blanchard, 1969), participative leadership (Hersey & Blanchard, 1969; House, 1996), and team leadership (Zaccaro, Rittman & Marks, 2001). Charismatic leadership as a concept was first mentioned in the works of Max Weber (1947) and later researched by Beyer (1999), Conger (1989), and House (1977). Transformational leadership behaviors, in many ways linked to charismatic leadership, has been studied by Bass (1996, 1997, 1998), Burns (1978), Kouzes & Posner (1987, 2012), and followed by Bass in 1990 and Bass and Riggio in 2006, connecting transformational and charismatic leadership with another look at the skills approach.

The late 20<sup>th</sup> and 21<sup>st</sup> century brought research and concepts that are more aligned with inclusive and relationship oriented leadership and organizational structures and away from authoritarian top down structures. We now hear of and see more research related to interpersonal factors such as authentic leadership (Gardner, Aviolo, Luthans, May, & Walumbwa, 2005; George, 2003; Terry 1993), ethical leadership (Johnson, 2012; Price, 2008; Shapiro & Stefkovich, 2001), moral leadership (Lennick & Kiel, 2008; Sucher, 2007), servant leadership (Greenleaf, 1970; Sergiovanni, 1999), value-added leadership (Heck, 2000), and collective-collaborative leadership (Mroz, 2007). The strengths and skills of women as leaders have been researched and discussed by Brown, Irby, & Jackson (2012), Gilligan (1982), Grogan & Shakeshaft (2011), Helgesen (1990), Noddings (1984), and Shakeshaft (1986) to name only a few. These strengths and skills have been variously identified in the literature as humanistic, democratic, collaborative, relational, caring, spiritual, transformational, justice oriented, considerate, participative, and interpersonal.

Following is a list of some of the leadership styles and behaviors that can currently be found in leadership literature:

Achievement-Oriented Diverse-Collective Purposive Effective Adaptive Relational Authentic Ethical Relationship-oriented Balanced Evolutionary Servant Caring Feminist Shared Change-Oriented Flexible Situational Charismatic Humanistic Spiritual Considerate Inclusive Strategic Collaborative Interpersonal Sustainable Collective Justice-Oriented Team Connected Moral Transactional Moral-Transformative Transactional-Contingency Transformational Cross-cultural Networked Transformational Cultural Participative Transformative Democratic Principled Value-Added Distributed Pragmatic Visionary

Yukl (2010) provides an insight into how confusing an analysis of leadership research can be. In a review of leadership behavior taxonomies he states,

Primal

#### 5.1

Diversified

A major problem in research on the content of leadership behavior has been the identification of behavior categories that are relevant and meaningful for all leaders...Behavior categories are abstractions rather than tangible attributes of the real world. The categories are derived from observed behavior in order to organize perceptions of the world and make them meaningful, but they do not exist in any objective sense. No absolute set of "correct behavior categories can be established. Thus, taxonomies designed to facilitate research and theory on managerial effectiveness have a somewhat different focus from taxonomies designed to describe observations of managerial activities, or taxonomies designed to catalog position responsibilities of managers and administrators. (p.66)

Yukl goes on to break down the many taxonomies into Primary Purpose, whether the taxonomy describes effective behavior, describes job requirements, or classifies observed activities, and Primary Method of research identifying factor analysis, judgmental classification, or theoretical-deductive (Yukl, 2010, p. 67).

#### 5.2 Transforming Concepts and Constructs to Theories

Early 20<sup>th</sup> century research introduced us to organizational structure and management theories such as Scientific Management (Taylor, 1947), Bureaucratic Theory (Weber, 1947), and organizational structures (Mintzberg, 1979). Organizational management theories introduced leadership trait, behavior, and style

theories, such as the Ohio Leadership Studies (Stogdill, 1948; Fleishman,1953), the Managerial Grid (Blake & Mouton, 1985), the Leader Behavior Description Questionnaire (Hemphill & Coons, 1957; Stogdill, 1963), and the Michigan Leadership Studies (Katz & Kahn, 1952; Likert, 1961). These respected theories have been researched, developed, tested, revisited, and proven through a variety of research methodologies over time. Later 20<sup>th</sup> and current 21<sup>st</sup> century leadership taxonomies such as styles, behaviors, and traits appear to be an outgrowth of concepts and constructs, one idea building upon another, rather than developed and proven through empirical research. To give an example of the development of a concept to a theoretical construct, we need look no further than the development of the more recently used terms of servant leadership, moral leadership, and authentic leadership.

# 6 Servant, Moral, and Authentic Leadership

#### 6.1 Servant Leadership

Greenleaf introduced the idea of servant leadership as a concept to both lead and provide service to people and organizations (Greenleaf, 1970, 1977). Spears (2002, 2010) examined and clarified Greenleaf's work by creating working definitions of the characteristics of servant leadership. Linden, Wayne, Zhao & Henderson (2008) further built upon the concept of servant leadership by defining servant leader behaviors as comprised of conceptualizing, emotional healing, putting followers first, helping followers grow and succeed, behaving ethically, empowering others, and creating value for the community. Northouse (2013) provides an excellent analysis of a model of servant leadership including antecedent conditions, servant leader behaviors, and outcomes including examples of practice (Northouse, 2013, pp. 225-232).

#### 6.2 Moral Leadership

In a movement away from discussions of organizational management of schools to concepts of moral leadership in schools, Thomas Sergiovanni (1992) addressed the topic of moral leadership, pointing out the importance of values, beliefs, and caring in the development of a school community rather than an organizational structure. Weick (1976) investigated the concepts of both tight and loose coupling in organizations. Schools can be viewed as complex organizations that are both bureaucratically structured (tightly coupled) and professionally oriented (loosely coupled) which can be evidenced by independence in carrying out job functions in support of the mission, such as teaching pedagogy, staff support functions, community collaboration, and administrative behaviors. Additionally schools are impacted by external forces in the forms of society pressures, policies, community norms and values which also added to the dichotomy of tight and loose coupling in educational organizations. A legally adopted educational policy or hierarchy of command, places a form of tight-coupled organizational structure on a school. The variety of values, beliefs, and norms of students and the local community it serves calls for more loose-coupling and flexibility in decision making, program development, and instructional techniques. This has opened the door to discussions of morals, ethics, values, community, and service as essential components in development of a school community and moral leadership in schools.

#### 6.3 Authentic Leadership

Robert Terry (1993) presented practical approaches to becoming an authentic leader. This type of leadership included one approach to leadership described as meaning. In Terry's Authentic Action Wheel, meaning is described as including guiding values, principles, and ethics. Bill George (2003) built upon Terry's Authentic Action Wheel when he presented characteristics of authentic leaders in Authentic Leadership: Rediscovering the Secrets to Creating Lasting Value. George presents and describes authentic leadership characteristics as passion and purpose, behavior and values, connectedness and relationships, consistency and self-discipline, and compassion and heart. The work of Gardner, Aviolo, Luthans, May, and Walumbwa (2005) opened the door to the development of the Authentic Leadership Questionnaire in 2008. This work provides an excellent example of scaffolding a concept to development of a construct and finally to a theory based on

research. Through the use of interviews with content experts and literature reviews, their research lead to the development and validation of the theory-based measure of authentic leadership in which four components are identified constituting authentic leadership: relational transparency, balanced processing, internalized moral perspective, and self-awareness (Walumbwa, Avolio, Gardner, Wernsing, & Peterson 2008).

# 7 Educational Leadership and Social Justice

When reviewing the list of leadership styles and behaviors presented earlier, there are a number that relate to social justice in educational organizations and relate closely to social science research steeped in investigating social justice. In particular, the terms moral, ethical, inclusive, evolutionary, moral transformative, cultural, feminist, servant, spiritual, and value-added leadership stand out as related to literature on social justice. Research exploring women and leadership has used descriptive words and phrases such as humanistic, democratic, collaborative, relational, caring, spiritual, transformational, justice oriented, considerate, participative, and interpersonal. This is not to say that terms such as political, shared, adaptive, authentic, structured, contingency, purposive, visionary, situational, sustainable, connected, and contingency do not or would not be leadership styles and behaviors that would be important in development of organizations of learning promoting social justice. All types of leadership hold an important place in organizational development, change, and improvement. As has so often been pointed out in the literature, the selection and use of specific leader behaviors and styles are more often than not situational.

Concepts such as moral, ethical, and servant leadership become integrated between personal and professional behaviors and may have an impact on issues and applications of social justice. Because of society's diverse cultural backgrounds, it is natural that there will be cultural and ethical inconsistencies when we are part of a group or organization and have interactions with others. These interrelationships force us to confront the differences between what may be defined as our personal code of ethics and our professional code of ethics (Beyer, 2004; Shapiro & Stefkovich, 2011) and may also create differences in understandings and applications of social justice. Marshall & Oliva (2010) take a deeper look at differences and their relationships to social justice in their discussions of the struggles of African-American and Hispanic/Latina women and their fight for social justice. This clearly carries over to the role of educational leaders at all levels and types of educational systems.

The most recent theoretical concepts found in educational and organizational leadership literature point out the need to more clearly define the connection of educational leadership to the concept of social justice in our educational systems. The National Association of Social Workers (2012) define social justice as "the view that everyone deserves equal economic, political, and social rights and opportunities" (para 2). Relating this definition to education, Knudson (2009) states,

#### 7.1

Students learn about the core democratic value of equality, which dictates that Americans have the basic right of equal treatment regardless of background, belief, economic status, race, religion, or sex. In addition, they learn about the core democratic value of justice, a fundamental belief that American society offers the same benefits and has the same obligations to all of its citizens. While both of these values teach students that individuals and groups are not favored over other individuals or groups, we need not look further than the very system that champions these tenets of social justice, the American education system, to recognize that disparate inequalities not only exist, but continue to be perpetuated. (Knudson, 2009, para 1)

It becomes a moral imperative for educational leaders to promote the concept of social justice in all educational organizations and in educational practices. Marshall and Oliva (2010) state that there are three essential components of social justice as it relates to school leaders—"leadership for social justice, moral transformative leadership, and social praxis" (p. 24). They go on to state that there are five characteristics that may be applied to all the definitions of social justice and educational leadership for social justice:

- 1. A consciousness of the broader social, cultural, and political contexts of schools.
- 2. The critique of the marginalized behaviors and predispositions of schools and their leadership.

- 3. A commitment to the more genuine enactment of democratic principles in schools.
- 4. A moral obligation to articulate a counter hegemonic vision or narrative of hope regarding education.
- 5. A determination to move from rhetoric to civil activism. (Marshall & Oliva, 2010, p. 23)

Women have played a strong role in the call for social justice. In particular, the concepts of caring, morals, ethics, and justice fill the literature on feminist theory, women in leadership, and social justice. Grogan & Shakeshaft (2011) have identified five ways that women lead as relational leadership, leadership for social justice, spiritual leadership, leadership for learning, and balanced leadership. In their discussion of leadership for social justice they state:

#### 7.2

Women are likely to report that they entered the field of education because they wanted to "change" the status quo. Studies of teachers indicate that women, more than men, identify educational careers as social justice work, even if they don't use that explicit language. Women, more than men, talk about having entered teaching to change the lives of children, to make the world a fairer place, and to change institutions so that all children have a chance. (pp. 10-11)

Marshall and Oliva (2010) in their Call for Action state:

#### 7.3

Leaders cannot make social justice happen by their passion and will alone. The huge shifts in cultural understandings and societal and school expectations will happen only with the shared values, coalitions, networking, and mutual support that come with the power of enlarging groups of people in social movements, which results in the building of social capital and, eventually, political power (p. 14).

Making this happen requires change and sustainability. It requires changes in policies, economic support, educational expectations, and a development of shared cultural values, beliefs, and norms. It also requires leadership directed toward not only change, but also toward sustainability to ensure it becomes the norm of society.

# 8 Summary and Suggestions for Further Study

The recognition of leaders and the development of leadership theory have evolved over centuries. Individual ideas, actions, and behaviors have been recognized as indicative of leadership within societal structures. This evolution has progressed over time from identifying individual personalities or characteristics to formal studies related to what constitutes leadership and why leadership is or is not successful. Some of these studies and observations have been informal and others have included empirical research. The studies of individual leadership styles and behaviors have contributed to the evolution of understanding what it takes to be a competent leader, one who is attuned to the needs of an organization and those they serve. We have seen much of this evolution in the study of leadership behavior become more connected not only to people within an organization, but extending to those external to the organization, understanding that the values, beliefs and norms of those providing input into the organization have a definite effect on the evolution and growth of the organization as a whole and its ultimate impact on the community and people it serves.

This historigraphic review of the literature is one step in identifying theoretical constructs and concepts specific to currently identified leadership styles and behaviors related to social justice. It assists in making a connection to answer the hypothesis that there is a relationship between leadership behaviors and their impact on social justice. Continued analysis of past and present leadership concepts and constructs and the process of scaffolding these in the development of accepted theory is needed to prove or disprove whether there is validity in the connection between organizational leadership behaviors and their impact on social justice both within and external to an organization.

The move toward social justice can be compared to the driving and resisting forces of change as described by Kurt Lewin (1951) in the concept of Force-Field Analysis and its relationship to social systems. Any

change directed toward the concept of social justice will require the lessening of social forces against societal change and increasing the support for social justice and the movement toward equal economic, political, and social rights and opportunities for all. An essential component of any change is the re-freezing process as described by Lewin to ensure sustainability. This will require leadership and a commitment of resources to a sustainable movement toward social justice. As Hargraves & Fink (2007) point out, "Sustainable leadership develops and does not deplete material and human resources. It renews people's energy. Sustainable leadership is prudent and resourceful leadership that wastes neither its money nor its people" (p. 445). As we look to the future of equal educational opportunities for all through the battle for social justice, we cannot overlook the words of Secretary of Education Arne Duncan in a speech made on October 9, 2009 in which he made the following strong statement relating social justice to the education of all children:

#### 8.1

I believe that education is the civil rights issue of our generation. And if you care about promoting opportunity and reducing inequality, the classroom is the place to start. Great teaching is about so much more than education; it is a daily fight for social justice (U.S. Department of Education, 2012, August 11).

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