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Development of a private sector version of the (Engaging) Transformational Leadership Questionnaire

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Abstract

Purpose – Notions of leadership change over time. The last two decades have been dominated by US models of “heroic” leadership, based largely on predominately male-biased samples, which have been focused on studies of “distant” leaders; but these are being challenged by the findings from more recent studies which question the potential dangers of adulating the few “gifted” “charismatic” individuals, not least of which because of the disasters they may cause. In addition, there is a growing interest by organisations of identifying how they can increase “engagement” amongst their employees, since this process appears to contribute significantly to organisational success. This study seeks to replicate an earlier study of “nearby” leadership in UK public sector organisations.

Design/methodology/approach – The study gathers qualitative data from a sample of female and male managers at various levels in three UK FTSE100 companies, developing a pilot questionnaire, and then gathering quantitative data from 743 managers in a range of UK and Hong Kong private sector organisations, and testing the validity of the instrument in predicting job satisfaction, motivation, commitment, and other psychological variables found to affect performance.

Findings – The model of “nearby” leadership to emerge in the private sector was highly similar to the public sector model, but very different from the “heroic” notions of leadership. Twelve dimensions of leadership emerged; all of which were found to predict the criterion variables outcome measures. This has led to the creation of a private sector version of the “(Engaging) Transformational Leadership Questionnaire”⁷, and provides empirical evidence of its validity among male and female managers in two countries.

Research limitations/implications – There is a need to extend research on the ETIQ in a wider sample of organisations and industries, and to undertake longitudinal studies to examine the predictive validity of the instrument on external outcome variables.

Practical implications – The findings have immediate practical application to leadership development, selection, promotion, appraisal, performance management, and culture change activities.

Originality/value – This investigation has adopted an inclusive approach to investigating the nature of day-to-day leadership behaviours that have a significant effect on the levels of stress, job satisfaction, motivation, commitment, engagement, and other psychological outcomes that have been found to significantly affect organisational performance in private sector organisations. It has also tested the validity of a new 360-feedback instrument on a sample of over 700 direct reports of managers who exert a powerful influence on the motivation, job satisfaction, and commitment of staff at various levels of leadership, based on male and female managers, and individuals from different ethnic backgrounds, in a range of private sector organisations, which focuses on a new model of “nearby” leadership.

Keywords Transformational leadership, Public sector organisation, Questionnaires, United Kingdom, Hong Kong

Paper type Case study

This paper draws a distinction between managerial or leadership competencies, and transformational and/or “engaging” leadership. It goes on to question the generalisability of USA approaches to transformational leadership – that are based on studies of “distant”
leaders, and which lead to an “heroic” model of leadership – for (UK) organisations in the 21st century. It describes the first major gender- and ethnic-inclusive study of “close” or “nearby” leadership based on data collected from three FTSE100 companies, which led to the development of a private sector version of the Transformational Leadership Questionnaire (TLQ)”[1], now re-named the “(Engaging) Transformational Leadership Questionnaire” (ETLQ)”[1]. Psychometric analyses lead to the conclusion that scales that comprise this version of the TLQ show high levels of internal consistency, have content, construct and convergent validity, and are to a large extent generalisable across two ethnic groups of managers from different kinds of private sector companies.

Introduction
According to Northouse (2001) leadership:

- is a process;
- involves influencing others;
- occurs within a group context; and
- involves goal attainment.

Such a definition does not, however, do justice to the important distinction that must be drawn between “leadership” and “management”. Leadership can be seen to be essentially open-ended in nature, and enabling organisations not only to cope with change, but also to be proactive in shaping their future. In contrast, management can be thought of as largely closed-ended, and aims at the enabling, and often the perpetuation, of existing structures and processes. Clearly, leadership and management are complementary, both being essential for any organisation to succeed, but they are distinct (Alimo-Metcalfe and Alban-Metcalfe, 2002; Bryman, 1996; Kotter, 1990).

The massive, often turbulent change that characterised business organisations in the 1970s and 1980s led to what has been described as the “new paradigm”, with its emphasis on being charismatic (House, 1977; Conger, 1989), visionary (Sashkin, 1988), and transformational (Bass, 1985; Bennis and Nanus, 1985; Tichy and Devanna, 1986). These were seen as revealing a conception of the leader as someone who, by defining an organization’s mission and the values which will support it, defines organizational reality. Thus, in the “New Leadership” approach, leaders are seen as managers of meaning, rather than in terms of simply an influence process (Bryman, 1996).

However, over the last few years – arguably fuelled by increased fanaticism – concern has been expressed, in the USA and elsewhere, as to whether even these “heroic” models, of “transformational leadership”, some of which are now 20 years old, and all of which have emerged from the USA, are relevant to organisations in the 21st century, and in particular to non-USA organisations and cultures (Alimo-Metcalfe and Alban-Metcalfe, 2002; Collins, 2001; Mintzberg, 1999). Another reason to question their generalisability is because much of the USA research has been based on observations of top managers in organisations, rather than managers at various levels, but assumptions have been made that the findings would be relevant for managers at all levels. It is worth nothing, however, that research by Shamir (1995) provides empirical evidence of differences between the characteristics ascribed to “distant” leaders, such as CEOs, as opposed to “close/nearby” leaders, such as one’s line manager/supervisor. Distant leaders were more likely to be perceived as “charismatic” and “inspirational”,
while the characteristics of “nearby” “leaders” included being “sociable, open and considerate of others, having a sense of humour…” (Shamir, 1995, p. 31).

In addition, increasing attention is being paid by organisations to the importance of how it can increase “engagement” of its employees, that is, their involvement, commitment, and enthusiasm for their job and the organisation. This is in part due to the fact that recent research has shown that organisations in which employees experience unusually high levels of engagement outperform their peers in the particular sector (e.g., Towers Perrin, 2005, IRS, 2004). For example, a recent USA survey over the last 5 years of 24 publicly traded companies with a total of over 250,000 employees, found that the stock prices of the 11 high morale companies increased an average of 194, while those of other companies in the same industries increased by an average of only 8 per cent – a margin of 240 per cent (Sirotta Survey Intelligence, 2006), and a Watson Wyatt (2006) study indicated that a company with highly engaged employees typically achieves a financial performance four times better than a company with poor employee attitudes. Link this to the findings that one of the most important variables contributing to “engagement” is the influence of the employee’s line manager, (Harter et al., 2002; Judge et al., 2001), and the need to understand the nature of “nearby” day-to day leadership comes into clear relief. For example, the Towers Perrin study concludes from its study of more than 85,000 people working for large and midsize companies in 16 countries on four continents, that “while many people are keen to contribute more at work, the behaviour of their managers and the culture of their organisations is actively discouraging them from doing so”. Furthermore, the USA Society for Human Resource Management found in its 2005 Workplace Productivity Survey, that almost six out of ten (58 per cent) Americans identified poor management as the biggest obstacle to productivity (SHRM, 2005).

Finally, there still appears to be little, if any, attention by leadership researchers, to ensuring that investigations of the nature of leadership are based on samples that represent the gender and ethnic diversity of society. Traditionally, the subject of leadership has been studied by men, of men, whilst drawing conclusions from the findings that are assumed to apply to humanity in general.

Hence our belief, that the nature of what are the behaviours and characteristics of managers who achieve high engagement, that is high levels of motivation, job satisfaction, and job and organisational commitment, based on an inclusive sample of individuals at various organisational levels, becomes a pressing subject for research in the field of leadership.

**The UK research into “nearby” “engaging” leadership**

An investigation of the nature of this “nearby” “engaging” leadership in the UK public sector, based on eliciting constructs of leadership from staff in relation to behaviour of their immediate line manager, resulted in the emergence of a wholly different understanding of the nature of leadership from the “heroic” models (Alimo-Metcalfe and Alban-Metcalfe, 2001, 2002, 2005), and one which is far more akin to Greenleaf’s (1970) notion of “servant” leadership, combined with a strong element of “relational” and “distributed” leadership.

**The (Engaging) Transformational Leadership Questionnaire (Public Sector Version)**

The UK public sector research was based on semi-structured interviews employing the repertory grid technique with a gender- and ethnic-inclusive group-inclusive sample of managers and professionals, at all levels (Board to middle level), in the NHS and local
government. The inclusion of a sample representing the diversity of the population was regarded as essential in order to ensure the face and content validity of any model that might emerge. The findings led to the development of the public sector version of the *Transformational Leadership Questionnaire (TLQ-Public)* (Alimo-Metcalfe and Alban-Metcalfe, 2000, 2005), which is being used extensively across the UK public sector. The UK Government's Home Office conducted an independent investigation of leadership in the police service, replicating the original research methodology and found a high level of concurrent validity for the model (Dobby *et al.* 2004). The *TLQ-Public* is being used extensively in the UK public sector, including on the Cabinet Office sponsored “Public Sector Leaders Scheme” and the Improvement and Development Agency “Advanced Leadership Programme”, where it is the principle diagnostic tool.

The success of this instrument led to demand for a private sector version. The purpose of this paper is to describe the research that was undertaken to investigate the nature of “nearby” leadership in the UK private sector, and from the findings to develop a private sector version of the *TLQ-Public*. It is also to compare the data that emerged from this research, with the data that were yielded by the UK public sector study, and with dominant USA “heroic” models of leadership.

**Methodology**

In order to develop a version of the *TLQ* that was based on the perceptions of managers and professionals working in private sector companies, the same methodology as used previously in the public sector by the authors (Alimo-Metcalfe and Alban-Metcalfe, 2001) was adopted. The original public sector research study was intended to:

- investigate specifically “nearby” as opposed to “distant” leadership;
- identify the nature of “nearby” leadership, as perceived by the ultimate arbiters, namely staff; and
- collect data from a sample of public sector employees that was inclusive by gender and ethnicity, and organisational level.

As with the original study, the first stage of the research adopted a “grounded theory” approach, to elicit constructs of leadership from the individuals in the initial representative sample. In the current study, this sample comprised 24 male and 23 female managers at different levels (Vice President to middle level) in three UK-based FTSE 100 companies (leisure and tourism; pharmaceuticals; telecommunications and e-commerce). Semi-structured interviews adopting the repertory grid method, and averaging one- to one and a half hours, were conducted (see Alimo-Metcalfe and Alban-Metcalfe, 2001). The process of the construct elicitation was to ask the interviewee to identify exemplars of the particular “object” under investigation – in this case “nearby leaders”, i.e. bosses with whom they had worked – and whom they considered outstanding, average, and “poor” (referred to as the “elements”), and then randomly selecting “trials” of these elements, and asking the person to identify what makes two of them similar to each other, but different from the third, and then to describe these characteristics as specifically as possible, in behavioural terms. In this way, over 1,200 constructs were elicited, which then formed the basis for the design of a “Pilot Questionnaire”, which comprised 173 items, which were statements of behaviour of a line manager/Supervisor. Ten criterion variables (Leadership Impact Measures) were included
in the questionnaire so as to examine the convergent validity of the instrument, and to compare the data with other, USA models of leadership, and the public sector version of the instrument. The pilot questionnaire was placed on a test publisher’s website to enable the research to be advertised to an extensive range of private sector organisations, and to expedite the data gathering process. Clients of the test publisher were contacted and asked to encourage individuals at all levels in their organisation to anonymously complete the questionnaire by rating their current or a previous boss. In the limited time available for gathering the data (approximately 3 weeks), data had been received from an opportunity sample of 743 managers, of whom 184 were female (Table I).

Results
The constructs of leadership that were elicited from the present private sector study were content analysed by two psychologists, working independently. Comparisons were made between the themes that emerged from the public and private sector samples, and also at the specific descriptors within those themes, that is the constructs, of which the themes were comprised.

There was far greater similarity than difference amongst the public and private sector constructs of leadership. In fact only 3 differences emerged. The first was that there were a few (n = 6 out of 1,200 + ) constructs relating “the fair distribution of extrinsic rewards” (e.g., bonuses, perks), to “nearby” leadership. Not surprisingly, they were only mentioned in the private sector; however, the frequency was very small. There were only two other differences. The first was in relation to the prevalence of constructs in relation to notions of “integrity”, with the public sector managers producing significantly more constructs, and greater complexity and variety in the quality of exemplars/constructs of this aspect of leadership.

The second difference, was perhaps more surprising. It was in connection with constructs relating to a concern for the needs of customers, and other stakeholders—both internal and external to the organisation. Again, the public sector managers provided a much wider, and more complex, range of behaviours, and significantly more examples. It may be worth bearing in mind that the public sector research was undertaken between 1999-2001, at a time when the UK government was introducing its “modernisation agenda”, of which one major theme was the emphasis on adopting client-centred approaches to service delivery.

The next stage was to translate the constructs into scales for the pilot questionnaire. Since there were insufficient responses to conduct a factor analysis, the decision was made to conduct a content analysis of the items, which was undertaken independently by two psychologists, in the light of dimensions identified by Alimo-Metcalfe and Alban-Metcalfe (2001) in the public sector version of the TLO. This process suggested the existence of twelve dimensions. Eleven of which were similar to those identified among UK public sector managers; an additional dimension was also interpreted as being concerned with entrepreneurial behaviour. The difference in the

<table>
<thead>
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<th>Ethnic origin/sex</th>
<th>Male</th>
<th>Female</th>
<th>Total</th>
</tr>
</thead>
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<td>White</td>
<td>279</td>
<td>83</td>
<td>362</td>
</tr>
<tr>
<td>Asian or British Asian</td>
<td>280</td>
<td>101</td>
<td>381</td>
</tr>
<tr>
<td>Total</td>
<td>559</td>
<td>184</td>
<td>743</td>
</tr>
</tbody>
</table>

Table I. Details of the sample
number of dimensions does not reflect any conspicuous differences in the overriding notions of leadership found in the two UK samples. In both samples the leadership dimensions fall into three recognisable clusters, namely, Leading and Developing Others, Personal Characteristics, and Leading and Developing the Organisation (or Team). In addition, the two dimensions in the public sector version of the TLQ™—“Being Honest and Consistent” and “Acting with Integrity” were better interpreted as comprising a single “Acting with Integrity” scale for the private sector.

The responses from the private sector sample as a whole were subject to item analysis (Kline, 1986), and found to support the identification of the 12 dimensions. The data were then analysed in two ways:

1. by ethnic origin; and
2. by sex and ethnic origin.

in each case testing for: internal consistency (Cronbach, 1951); and inter-item correlations (Cortina, 1993; Table II).

When the data were analysed by ethnic group, the inter-item correlations for the “White” managers as a whole were in the range $r = 0.30$ to $0.77$, the lower coefficient being that recommended as a minimum (Cortina, 1993; Kline, 1986). Among the “Asian and British Asian” managers as a whole, in the cases of some of the scales, the correlation coefficient for certain items did not reach the 1 per cent level of probability. Accordingly, these items were deleted. Following their removal, the inter-item correlations on eight of the ten coefficients ranged from $r = 0.30$ to $0.70$; for “Acting with Integrity” and “Entrepreneurial”, the range was $r = 0.26$ to $0.63$ and $0.29$ to $0.63$ ($p < 0.001$ in each case).

When the sample was divided by sex and ethnic origin, for the revised scales the lowest inter-item correlations were: $r = 0.25$ ($p < 0.01$) for “White” male managers; $r = 0.21$ ($p = 0.06$, ns) for “White” female managers; $r = 0.22$ ($p < 0.05$) for “Asian and British Asian” male managers; and $r = 0.23$ ($p < 0.05$) for “Asian and British Asian” female managers. Thus, even where the inter-item correlations for different sub-groups did not reach the recommended 0.3 level, the coefficient was significant beyond the 5 per cent level, with a single exception, such that each of the scales can be regarded as consistent and uni-dimensional. Scales were calculated by summing the individual items to form the “(Engaging) Transformational Leadership Questionnaire (ETLQ-Private)”.

The mean scores on the scales ranged from 2.37 to 3.03 (SDs 0.96-0.99). The coefficients of variation (Yeomans, 1968) which ranged 31.0-44.0, indicate that the ratings were highly differentiated, and the distributions of the same order of magnitude.

Convergent validity
Product-moment correlations were calculated between each of the scales and each of ten criterion variables, such as job- and organisational commitment, motivation and job satisfaction, all of which have been shown to be significant predictor of organisational performance (Alimo-Metcalfe and Alban-Metcalfe, 2005; Parker et al., 2003; Patterson et al., 1997; Xenikou and Simosi, 2005).

For the “White” female managers, the coefficients ranged from $r = 0.28$ ($p < 0.05$) to $r = 0.82$ ($p < 0.000$); for the “White” male managers from $r = 0.42$ to $r = 0.77$ ($p < 0.001$, in each case); for the female “Asian and British Asian” managers from $r = 0.52$ to $r = 0.83$ ($p < 0.001$, in each case); and for the “Asian and British Asian” male
<table>
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<tr>
<th>Scale</th>
<th>No. of items</th>
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<th>No. of subjects</th>
<th>Mean</th>
<th>SD</th>
<th>α coefficient</th>
<th>Inter-item correlations</th>
<th>Coefficient of variation</th>
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Notes: W-All = "White" All managers; W-Male = "White" male managers; W-Female = "White" female managers; A-All = "Asian and British Asian" All managers; A-Male = "Asian and British Asian" Male managers; A-Female = "Asian and British Asian" Female managers

Table II.

Managers, from $r = 0.52$ to $r = 0.77$ ($p < 0.001$, in each case). It may, therefore, be concluded that the results are consonant with the validity of the private sector version of the TLQ.

Discussion
The intrinsic and potential value of each of the scales identified here can be determined with reference to their content, construct and convergent validity.

Content validity
Firstly, the use of a Grounded Theory approach is wholly consonant with the Third Corollary of transformational leadership, which states that, "whatever the country, when people think about leadership, their prototypes and ideals are transformational" (Bass, 1997, p. 135). Secondly, the structure of each item followed the principles of Facet Theory (Donald, 1995). That is, each of the statements was redrafted in a standard format, so that the following criteria were met:
Thirdly, consistent with Hunt's (1996) recommendation, only items which referred to the behaviour of the leader, as distinct from the effect that s/he might have on others, were included.

Construct validity
The construct validity of the scales among both the UK and non-UK managers can be assessed by considering ways in which the items that each comprises measures aspects of transformational leadership identified in the literature.

1. **Showing genuine concern.** This scale relates to Burns' (1978) notion of the need for leaders to engage the whole person of their followers, reflected in sensitivity to their needs and feelings, active support of their development, and communicating positive expectations. There are also similarities with Bass's notion of "Individualised consideration", with the sensitivity to followers' needs (Conger, 1989), and with respectful leadership (Sashkin, 1988).

It differs, however, in being more complex in terms of the specificity and range of items and including items about valuing and developing the team, as well as the individual.

2. **Enabling.** This scale is concerned with the extent to which empowerment is achieved as a result of the manager trusting her/his staff to take decisions, and encouraging them to take on responsibility, to think of new approaches to problems, and to think strategically. This aspect of transformational leadership can be interpreted in the context of the work of Sashkin and of Conger. It is not a dimension in its own right in Bass' work, but constitutes an element of "Individualised consideration".

3. **Being accessible.** This is concerned not only with accessibility to the manager, but also the adoption of an interpersonal style that is neither threatening, nor too formal, and to a manager's sensitivity to the impact of her/his actions on staff (see Bass's "Individualised consideration", and also "Intellectual stimulation". Accessibility and approachability do not appear to be addressed explicitly by Bass, but can be linked directly to two dimensions of Tichy and Devanna (1986), and to that of Conger's model.

4. **Encouraging questioning.** The encouragement of questioning and of critical and strategic thinking by staff, can be seen as central to the concept of transformational leadership. It is reflected in Bass' "Intellectual stimulation" dimension, with its emphasis on encouraging staff to challenge the status quo, and is predicated on the active, critical involvement of others.

5. **Acting with integrity.** This factor assesses two aspects of integrity – honesty in dealings with others, and on being consistent and equitable in the treatment of staff. As such, it reflects the observation of Burns (1978, p. 20), that
transformational leadership is a process whereby, “leaders and followers raise one another to higher levels of morality and motivation”. Integrity also distinguishes the authentic from “pseudo-transformational” leaders, the latter of whom are “self-aggrandizing”, “self-interested”, and “exploitative of others” (e.g., Bass, 1998; Bass and Steidlmeier, 1998). In the present study, however, “integrity” forms a separate factor in its own right, and the integrity and transparency factors emerging from the UK data are characterised by a sense of humility and vulnerability, which is not such a conspicuous feature of the original USA transformational model.

(6) Being entrepreneurial. The concept of being entrepreneurial does not appear to exist as such in the transformational leadership literature. However, insofar as entrepreneurial behaviour is orientated toward enabling an organisation to deal effectively with the external environment, including the effect of change, it can be seen to be transformational. It does, though, relate strongly to elements of the Conger and Kanungo (1988) model of charismatic leadership, and in particular to the “strategic vision and articulation” dimension.

(7) Inspiring others. This scale relates directly to the other aspects central to USA conceptions of transformational, and charismatic leadership (Bass, 1985; Conger, 1989; Conger and Kanungo, 1988; House, 1977). However, the items that comprise the present scale are concerned with nearby rather than distant conceptions of leadership, and are best exemplified by, “Is able to inspire their staff with their passion and determination, such that they want to join them”. This is congruent with Conger’s (1989) position that to demonstrate a vision in the absence of other behaviour is not sufficient to ensure charisma.

(8) Resolving complex problems. This factor combines personal capabilities that can be seen to be transformational in nature, such as, flexibility in thinking, e.g., “Is able to handle ambiguity and uncertainty”, with items that reflect intellectual capacity, such as “Can isolate the core issues in complex problems”.

(9) Networking. The Networking scale focuses attention on the way in which the manager is able to inspire both colleagues and external stakeholders. The communicating and implementing a vision aspects of this factor link directly to Conger’s framework – communicating the vision, and to vision and articulation identified by Tichy and Devanna; to House’s notions of a charismatic leader; to Sashkin’s visionary leadership, and to communicating the vision personally (Bennis and Nanus, 1985).

The “networker” aspect of this factor merits comment in the light of Kotter’s conceptualisation of vision and charisma, in terms of “agenda setting” and “networking” (e.g., Kotter, 1990). For Kotter, networking involves establishing as wide a set of contacts as possible, and using interpersonal skills to influence these and other people, and events. Hunt (1996) commented that Kotter’s proposal serves to reduce the “mystique” surrounding charisma, and noted that Luthans and co-workers (e.g., Luthans and Lockwood, 1984) and Yukl (1994) incorporated the networking aspects of transformational leadership into their typologies, though, as Hunt (1996, p. 197) states, made no claim that they tapped “charisma”. The scale also shares some characteristics in common with Bass’ “Inspirational-charismatic” dimension. The UK scale, however, has the important additional aspect of “sensitivity to the agenda of different key
players/interest groups, such that they all feel they are being served by the vision”. Thus, while there is some similarity with USA models, the essential difference is that the UK dimension has a much stronger sense of working collaboratively With “Constituents”/Stakeholders, On An Understanding Of Their Agenda, And Of Creating A Shared Vision. Crucially, it emphasises the reciprocal process, rather than being purely self-serving.

(10) Focusing team effort. Inclusion of focusing effort may seem strange, since it would, at first glance, seem to be transactional rather than transformational in nature. However, three points should be considered. One is that the dimension combines items, such as, “Enables individuals to see how their work is essential to the organisation”, may readily be interpretable as transformational in nature. The second is that research on stress (e.g., Offerman and Hellman, 1996) indicates that a combination of autonomy with clarification of objectives is an important predictor of reduced job-related stress. The third is that it is the manner in which any clarification is given that is crucial; the same request can be enacted in a transactional or a transformational way. It resembles, in part, Tichy and Devanna’s stage 4, “mobilization of commitment”.

(11) Building shared vision. This scale measures attributes and behaviours that have always been regarded as fundamental components of transformational leadership (e.g., Bass, 1985, 1998; Sashkin, 1988), but extends and modifies this aspect of leadership. Having a sense of vision is, for Bass, a characteristic of charismatic-inspirational behaviour, whereas Sashkin emphasises the importance of strategic behaviour within the visionary leadership framework.

However, the present scale goes beyond the traditional concept of a vision as being something that is defined by the leader – as in concepts of “distant” leadership, based on “heroic” models. Rather, as might be anticipated in a model of “nearby” leadership, it is a process that is articulated on the basis of engagement with all those who have a stake in the development of an organisation, department or team, or in working with the leader in a relationship of partnership, and with clients.

(12) Facilitating change sensitively. This scale can be seen in some ways to complement the emphasis on Encouraging Questioning (Scale 4), by seeking to find a way in which staff can be enabled to deal with the effects of change, e.g. “Is sensitive to the impact that changes in the external environment can have on the organisation”. Indeed, according to House (1977), the need to influence (as distinct from control) is one of the characteristics that differentiates charismatic leaders. He also pointed out that, whereas traditional (i.e. transactional) leaders emphasise “expectancies” and “cognition”, charismatic leaders have greatest effects on subordinates’ emotions. Similarly, according to Bass, transformational leaders achieve goals through relationships that involve leader-subordinate exchange.

Convergent validity
In order to examine the convergent validity of the instrument, ten items (criterion variables) were included in the Pilot Instrument. These were designed to measure the perceived effect of the manager on her/his direct reports/staff, in ways that have consistently been shown to have a direct influence on organisational performance.
Four of the items have been used by Bass to establish the convergent validity of his instrument, the Multi-factor Leadership Questionnaire (MLQ) (Bass and Avolio, 1990). A fifth item - "reduces job-related stress" was chosen:

- because of increasing concern about high levels of stress in UK organisations (e.g. CBI, 1999); and
- in the light of substantial evidence that leader behaviour, such as allowing greater autonomy and empowerment, and offering greater social support, moderates the deleterious effects of performance pressure (e.g., Fox et al., 1993; Offerman and Hellman, 1996), and the stress of needing to adapt to constant change (e.g. Cunningham et al., 2002).

In view of the possibility of "method variance" effects, caused by collecting all the data through a single instrument (e.g., Spector and Brannick, 1995), and "halo" effects, consequent on the use of data where dependent and independent variables are assessed using the same instrument, these results were interpreted as being consonant with the validity of the (E)TLQ-Private™, rather than as definitive. This conclusion can be drawn for the sample as a whole, and when the sample was divided by ethnic origin and by sex. At the same time, it should be noted that, given that the present instrument has only just been developed, evidence from objective criteria is not yet available; as noted, the criterion variables chosen were those employed in the early stages of the validation of a comparable instrument. Furthermore, and more significantly, responses to the Pilot Instrument were collected under conditions which ensured complete anonymity. To have been able to match the data upon which the (E)TLQ-Private™ is based with other-source ratings of, say, effectiveness, would have compromised the anonymity of the responses, and thus, compromised the quality (i.e. the integrity) of the instrument. It was judged that, at this exploratory stage, the integrity (construct validity) of the instrument was of primary importance. Nonetheless, assessing an individual's impact on their staff, would seem to be perhaps the most valid way of assessing leadership, as defined as a social influence process.

It is also worth noting that some leadership writers are asserting that subordinates' views of leadership are the only valid way of assessing the phenomenon. Hogan and Hogan (2001, p. 40), for example, recently state in an article concerned with the assessment of leadership that, "self-ratings of leadership, are unrelated to team performance and are essentially useless … researchers use superiors' ratings … [which] primarily reflect a manager's technical competency rather than the performance of his/her team… [and] peer ratings… we suspect, are contaminated by politics". They go on to note that, "subordinates" ratings of a manager's performance are reliably correlated with team effectiveness. We believe subordinates' ratings are the best single way to evaluate a manager's performance."

Furthermore, in a study by McEvoy and Beatty (1989), in which the predictive validity of data collected from the performance of managers undertaking an assessment centre were compared with the anonymous ratings of their direct reports for development purposes, the direct reports ratings were found to be significantly more accurate in predicting the managers' performance two, and four years later. The study's authors concluded: "…this study places subordinate ratings in the upper echelons of performance…".
Conclusions
This study was intended to investigate the nature of “nearby” leadership from the perspective of those who ultimately determine the leader’s effectiveness, namely their staff/direct reports. It was regarded as addressing an increasingly important challenge for modern organisations, which is, how can the discretionary effort of employees throughout the organisation, be “engaged” in a way that will ultimately enable the organisation to achieve its objectives? Recent studies of organisations that out-perform their peers in the same sector have provided evidence of the powerful impact of “engagement” on the bottom line. These findings, together with the growing attacks on the out-dated notions of “heroic” models of leadership that encourage adulation of a few gifted individuals at the top of organisations at the expense of the vast majority of other employees in an organisation, add weight to the business case for ensuring that leadership is seen as a characteristic of the day-to-day behaviours of managers at all levels in the organisation, and as fundamentally a relational process which can be developed.

The instrument that emerged from the current investigation, the (Engaging) Transformational Leadership Questionnaire (ETLQ Private sector version)™, has been shown to achieve the essential psychometric criteria of reliability and content, construct, and convergent validity. The present study was possibly the first deliberately inclusive investigation of leadership, and as such can be assumed to be gender-fair. It is also worth noting that the results suggest the generalisability of the dimensions to managers who describe themselves as “White” and those who describe themselves as “Asian” or “British Asian”.

It is interesting to note that there was very little difference between the findings from the original study by the authors of nearby leadership in two large public sector organisations, another independent study conducted in the UK police service, and the current study based on collecting data from individuals in various industries in the private sector.

The most conspicuous difference to emerge, is in relation to the concept of leadership that emerges from the UK research, compared to that from past USA studies. This is that, whereas USA models which have focused on characteristics of leaders who are often “distant” leaders, such as chief executives (see Bryman, 1996; Shamir, 1995), result in “heroic” models of leadership, the UK studies, with their focus on “close”/“nearby” leaders, reveal more of a “leader as servant” notion of leadership (Greenleaf, 1970).

Overall, the UK concept of transformational leadership appears to be much more consistent with the explanation of Shamir and colleagues, of the effects of nearby leadership. They explained that the potency of some individuals to be perceived as possessing leadership qualities is due to their ability to increase followers’ sense of self-efficacy by “increasing self worth and communicating confidence and high expectations” (Shamir, 1995, p. 583), and then linking followers’ goals to “the present and to values in a framework of a “mission” which serves as a basis for identification, [and for] generating faith by connecting behaviours and goals to a “dream” or a utopian ideal vision of a better future”.

This distinction between USA and UK approaches is also consistent with Yukl’s (1999, p. 295) distinction between the “heroic” model of the charismatic leader, with whom followers identify strongly, and may become passionately devoted to, versus the charismatic leader who affects a process of influence encouraging followers to internalise what is being advocated, by linking the task objectives, and the mission, to the followers’ core values and self-identity.
Whilst we see our findings as reflecting the latter influence process, we would stop short of Yukl’s development of this idea when he states that, “When followers come to see their work roles as an important part of their self-identity, successful performance becomes very important for their self-acceptance and self-worth. Followers will make self-sacrifices and exert effort in their work to facilitate achievement of the task objectives” (Yukl, 1999, p. 295). Our reservation here is about the suggestion that such “followers” become almost subservient to the organisation’s mission. In contrast, we believe that it is the congruence between the individual’s values, capacities, and aspirations, and the organisation’s appreciation, support, and commitment to development of their employees that strengthens the leader-follower relationship. Although we use the term “follower” here, we do not believe that it appropriately describes the essential nature of contemporary expectations of “nearby” leaders – or to put it more explicitly, of bosses – as articulated by the participants in the present investigation. The particularly strong theme to emerge in the current study, was the sense of partnership between bosses and their staff; of mutual respect, and support, and a sense of excitement on working truly collaboratively on shared visions.

The present study presents a clearer picture of leadership as a social influence process, in which “connectedness” between the leader and direct report is not only the most powerful component, but is reflected explicitly in the twelve scales. The need to define more clearly the social influence process has been articulated by Parry (1998). The findings, thus, provide a detailed, operational definition of the various components of leadership, in a way that can be of immediate use to guide the wholesome exploitation of individuals’ strengths, plus the meeting of developmental needs at different levels of management, and to inform selection and promotion decisions, appraisal, and performance management practices.

Whether differences between the UK and USA notions of leadership are due to the differences in methodology, or are attributable to other cultural or organisational differences, or whether the main influence has been the passage of time and the significant social, technological, economic, political, and/or other global changes, has yet to be determined. What we are not proposing, is that a “grand USA model of leadership” be replaced by a “grand UK model”. Indeed, we would not encourage this since we firmly believe in the value of “emic” studies (Berry, 1969; Pine, 1967), particularly where social influence processes are involved, as in leadership. We are, however, proposing that research into the nature of leadership, which continues to fascinate, and which appears to be increasingly sought by society, can richly be strengthened by leadership researchers investigating the nature of what is perceived as leadership by individuals from different cultures, organisations, genders, ethnic groups, and a variety of combinations of these and other variables. To conduct surveys using standardised instruments, across various countries and cultures is undoubtedly an important aspect of leadership scholarship, but whilst it may identify some of our similarities and differences, such findings cannot be interpreted as truly valuing, (and perhaps properly benefiting), the diversity of humanity.

Undoubtedly notions of leadership are influenced by events in wider society. Thus, it seems appropriate to cite a quotation from a USA writer (Vecchio, 2002), which cogently reflects the concerns of a world at the beginning of the 21st century:
Cynicism concerning people in power... seems to be at comparatively high levels...
The emerging era of terrorist threats may rekindle interest in leadership, targeted toward
the promotion of inclusion, unity, and allegiance, and less toward the emphasis of division
and separateness.

Our hope is that this study will take us one step forward in achieving such a vision.

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Further reading


Transformational leadership


About the authors
John Alban-Metcalf read Zoology at Oxford, and later became qualified as a Psychologist. After 30-plus years working in Teacher Education, during which time he was involved in a number of European projects, he joined the staff of Real World Group as Director of Research. Joint research undertaken with Beverly Alimo-Metcalfe led to the development of a number of diagnostic instruments, including the Public Sector Version of the (Engaging) Transformational Leadership Questionnaire, which was based on the largest-ever single study of leadership, and was both gender- and diversity-inclusive. More recently, he has been involved in a number of large-scale research projects, including for the Department of Health, the National College for School Leadership and the Home Office. He is also co-author of the Leadership Climate & Change Inventory, the Embracing Diversity Inventory and iGovernance. He is the corresponding author and can be contacted at: john@rwl.co.uk
Beverly Alimo-Metcalfe has established an international reputation in the field of leadership research, and is passionate about dispelling the many myths surrounding the topic, and in supporting the ethical application of leadership, and valuing difference, at all levels in organisations. In 2000 she and Dr. John Alban-Metcalf undertook the largest-ever investigation of leadership, involving over 4,000 male and female, and ethnic minority managers and professionals in the UK, which led to the development of the (Engaging) Transformational Leadership Questionnaire (TLQ). 300 feedback instrument that has been adopted by many major UK organisations, and is being used by researchers across the world. The model of leadership reflected in the TLQ meets the increasing demand for non-heroic models of leadership, in which leadership is seen as distributed across the organisation, and based on values of respect, transparency, questioning and engagement. The outstanding success of the TLQ and related instruments developed from the research of her and her colleagues' research, led to the creation of the University of Leeds spin-out company, Real World Group (formerly Leadership Research & Development), to which she is seconded as its Chief Executive. Real World Group works across the UK and abroad, with public, private and third sector organisations in supporting leadership, Diversity, Governance, and cultural transformation initiatives, and advising numerous national agencies.

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