Leadership and Management in Learning Organizations

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LEADERSHIP and MANAGEMENT

in

LEARNING ORGANIZATIONS

Canadian Edition

Clayton Smith – Carson Babich – Mark Lubrick

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Welcome to *Leadership and Management in Learning Organizations*, a comprehensive, online, open education resource available for students, educators, and administrators who would like to learn more about leadership and management within learning organizations. From a classical to contemporary understanding of leadership and management, to learning principals and ethical implications, to teamwork and building a cohesive nature through diversity. *Leadership and Management in Learning Organizations* will provide a concise framework to allow reflection on these imperative topics.

Our philosophy incorporates the idea of providing thoughtful educational content, without the financial burden of a for-profit textbook. We feel the content provided in this resource will engage, enhance, and construct new and deep learning within the readers, forging a connection between the leadership and management material, the world of education and, the learning organization.

Much of this book was influenced by Schermerhorn and Wright's *Management: Third Canadian Edition* (2014) along with concepts from Senge's *The Fifth Discipline (1990).* The world of business management and the learning organization are tied together in a true, interdisciplinary way to draw connections, contextualize, and create a framework to how the concepts complement each other. The connection of these two factions creates a multi-faceted structure that applies to individuals in many disciplines.

We hope you enjoy your journey through *Leadership and Management in Learning Organizations*, and develop personal connections along the way.

-Clayton Smith, Carson Babich, and Mark Lubrick

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Carson Babich

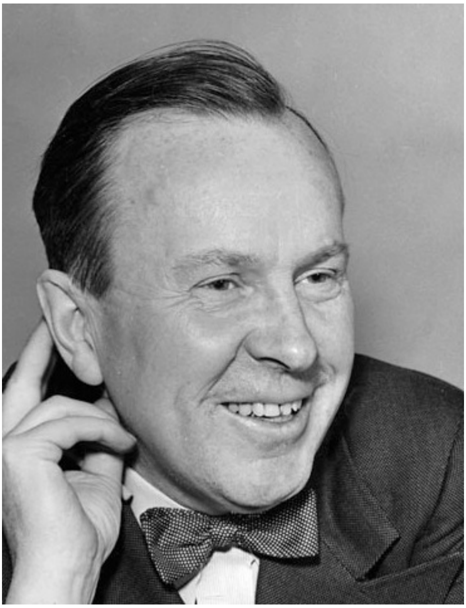
Carson Babich, is currently a graduate student in the Faculty of Education at the University of Windsor. His research interests include the interdisciplinarity of instructors at institutes of higher learning, and the effectiveness of Open Education Resources (OER) in interdisciplinary classrooms. Before academia, he spent 10 years within the hospitality sector as a manager, rooms controller, and department trainer at properties that include The Fairmont Banff Springs, Fairmont Jasper Park Lodge, and EPCOT at Walt Disney World in Florida. Carson earned his B.A., and is working towards his MEd. In Educational Administration both at the University of Windsor.

Mark Lubrick

Mark Lubrick is an Online Learning Design Specialist within the Office of Open Learning. He is a University of Windsor alumnus with bachelor's and master's degrees in Physics, a bachelor of Education, and is currently working on a PhD in Education. Mark is thrilled to be a part of the Office of Open Learning team as he loves teaching and believes that online learning provides exciting opportunities for students and faculty alike. Furthermore, he believes that online multimedia courses will be an integral part of the University's future and is glad to help lead the charge in their development. Prior to moving to the Office of Open Learning, Mark worked as a sessional instructor for the Department of Physics, where he still teaches online astronomy courses. He has taught courses ranging in size from 30 students up to around 950 students, and has enjoyed every class. Mark enjoys contributing his passion for education and course development to the Office of Open Learning.

PART I

CHAPTER 1: INTRODUCTION TO EDUCATIONAL LEADERSHIP AND MANAGEMENT IN LEARNING ORGANIZATIONS



Pictured is Lester B. Pearson. A Nobel Peace Prize winner and former Canadian Prime Minister is considered one of the most influential leaders in human history.

What is a leader? What is a manager? Are the two subjects separate or do they follow the same thread? Most textbooks give a succinct description of the similarities and differences between leaders and managers. Ours, however, will place it in the context of the learning organization, which in turn leads to the question: What is a learning organization? Generally, a learning organization continually adds knowledge, which is similar to an educational organization: a group of individuals located in a specific place to impart knowledge[1].

In this chapter, we will discuss leadership and management by describing the learning organization in greater depth. Self-awareness in leadership and management, an outsider's view of leadership and management, and the use of metaphors to understand organizational complexity will also be addressed. The world of leadership and management is an ever growing, ever expansive idea that changes with time. Here is an introduction to that world.

The learning outcomes for this chapter are:

1. Define the classical definition of leadership and management.
2. Define what a learning organization is and how it functions.
3. Develop an understanding of self-awareness and how it is used by leaders and managers.
4. Contextualize the different descriptions of leadership and management.
5. Use of metaphors to understand leadership, management, and organizational complexity.

Chapter Tips:

- Attempt to develop your own understanding of leadership and management.
- Engage with the Johari Window exercise to develop a sense of your own self-awareness.
- Create some of your own metaphors to understand leadership.

1.1 What is Leadership and Management?

How do we define leadership and management? Leadership is an act or behavior, such as developing a structure, so that group members know how to complete a task. A word that is commonly associated with leadership is “motivation,” as in the ability to motivate individuals to carry out tasks. In addition, encouragement, power, and agreement to achieve certain group or organizational goals are characteristics of leadership. The level of leadership relies on the social and group relationship that is present to formulate a vision and direction for the group.

Leadership is defined as a social relationship between two or more persons who depend on each other to attain certain mutual goals in a group situation[2]. Good leadership helps individuals and groups achieve their goals by focusing on the group’s *maintenance needs* (the need for individuals to fit and work together) and *task needs* (the need for the group to make progress toward attaining the goal)[3]. Leaders are the individuals who will take charge in an organization and delegate responsibility to other members to achieve the best results. Leaders provide the members of their team with the tools for success and are the emotional captains of the ship. Chapter 3 will delve into the leadership style present in organizations, along with how leaders use power to motivate individuals.

Successful organizations have productive management teams. When this is the case, companies can complete goals toward becoming more competitive in the new technical and global business world. **Management** is generally defined as the process of planning, organizing, directing, and controlling the activities of employees in combination with other resources to accomplish organizational objectives[4] In a way, management is taking the leadership concept and putting it into action.

Management is shaped by an individual's duties to the organization. Managers have described their responsibilities in nine different factors[5]:

1. *Long-Range Planning* – critical planning and development.
2. *Controlling* – Evaluating and "following up" with action.
3. *Environmental Scanning* – Aware of organizational and global changes in the business landscape.
4. *Supervision* – Oversee employee work, but not micromanaging.
5. *Coordinating* – Coordinating the work of a department and at times an organization.
6. *Customer Relations and Marketing* – contact with current and future customers.
7. *Community Relations* – Contact must be nurtured with outside the company such as vendors, suppliers, municipal, state/provincial, and federal agencies (especially as a not-for-profit)
8. *Internal Consulting* – Use of expertise to solve organizational problems
9. *Monitoring Products and Services* – Having a hand in the development monitoring and delivery of products and services.

Management exists in virtually all goal-seeking organizations, whether they are public or private, large or small, profit-making or not-for-profit, etc[5]. All organizations have had some basis in developing from management theory. Chapter Two will look deeper into some of the classical and contemporary management theories that are present in organizations. In addition, we will use management as a tool for self-reflection.

The difference, and in many ways similarities, between leaders and managers relies on the effectiveness of the leader or manager. Many contrasts can be found between leaders and managers through conceptual ideals and notions relating to both. First, we look at the definitions; words associated with leadership are social, influence, and relationships. This is in contrast with words linked to management, such as organizing, directing, and controlling [5]. Both require action to be taken, but it is the level of action that is needed where differences emerge.

Leadership can be regarded as a macro approach to situations requiring broad strokes of ideology in shaping an organization. Management, on the other hand, involves taking a micro approach: using systems to develop an a + b = c method. Second, both leaders and managers exercise power in their organizations, however, both may take different approaches to showing power. Managers are often described as using the rewards and punishments approach; benefits and bonuses for good work, corrections and reprimands for bad work. Leaders, on the other hand, can use perks and penalties, but most leaders use a mix of expertise and aesthetic features to gain social influence within an organization[6]. In many ways, the manager will use inducements while the leader will create the ideas as to why the the awards and corrections are beneficial to success.

Review Questions

1. How do we define leadership and management?
2. What are the nine responsibilities managers have to an organization?
3. What are some of the similarities and differences you see with leadership and management?

1.2 What is a Learning Organization?

The ***University of Cambridge*** *in England****,*** *is considered one of the most reputable institutions of higher learning in the world.*

One of the most common ideas about a learning organization is that it only relates to institutions of higher learning. The focus may be on educational institutions, but a **learning organization** can be any establishment that fosters growth through learning, and continues to expand that growth in the future. Therefore, any operation that expands growth though learning from a small business to a Fortune-500 company, in theory, could be a learning organization. However, it would be irresponsible to leave out colleges, universities, and professional schools as main contributors in the field of education. The main concept of an institute of higher learning is that it creates and fosters knowledge passed on from professors to students. A learning organization is not strictly related to places of instruction; but associations of teaching comprise most of the characteristics of a learning organization.

Peter Senge, one of the most prominent researchers on learning organizations, describes it as a group of people who "continually expand their capacity to create the results they truly desire"[6]. Its role is to be an empowering tool not only within the walls of the building, but also outside in the community and in society. In theory, learning organizations should generate personal mastery and self-awareness within the individual.

How does a learning organization function? Most of them are similar classic businesses in relation to their overall make-up. Theorists Burns and Stalker[7], and later Emery and Trist[8], and also Mintzberg[9], have outlined two organizational structures: mechanistic and organic. **Mechanistic organizations** are predominantly run as a top-down hierarchy with formal rules and a narrow span of control. **Organic organizations** have more of a flat span of governance, with flexible rules and a participatory model of decision making. Figure 1 describes in more depth, the different characteristics of both organizational structures.

Mechanistic (Stable, low uncertainty environment)	**Organic** (Unstable, high uncertainty environment)
Top-down hierarchy	Less rigid, horizontal organization
Narrow span of control	Flexible, few rules
Specialized tasks	Two-way communication
Formal rules	Participatory decision-making
Vertical communication	Generalized shared tasks
Structured decision-making	Wide span of control

Figure 1: Mechanistic and Organic Organizations (Source: Copyright Rice University, OpenStax, under CC-BY 4.0 license)

Most learning organizations function within the first model of a mechanistic structure. Colleges, universities, and professional schools work in a top-down format, usually with a board of trustees, president, deans, department heads, and faculty (Figure 2). Although institutes of higher learning are continuously growing with regard to developing knowledge, most have maintained a business model that follows a strict set of guidelines and have a small span of control.

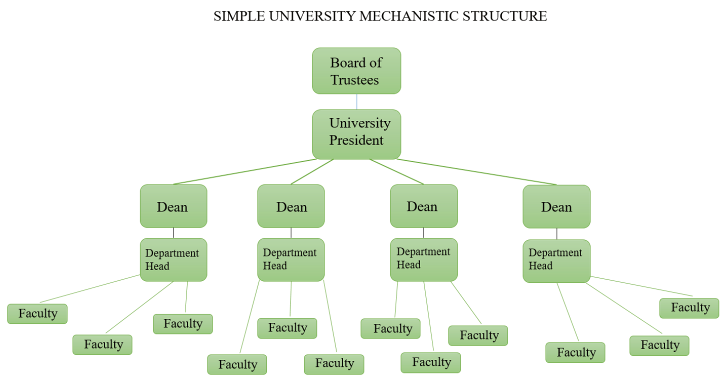


Figure 2 Simple University Mechanistic Structure

The structure in Figure 2 would be characteristically described as a formal structure which compliments a mechanical design. A **formal organization** is defined as a set of relationships and responsibilities set from upper management to subordinates[10]. On the other hand, there are organic organizations that could also find a place inside learning institutions on a smaller scale. When looking at a research project that has been accepted, such as a grant, an organic structure may be used to work through the research. We may have a professor at the head of the research process, with other professors joining as movement through the research advances. Using the organic structure follows the method of an informal organization. **Informal organizations** are emergent, complex, and run as a network of different individuals with evolving relationships[10]. Figure 3 shows a simple research process that illustrates the emergent, complex style; and how different entities interact.

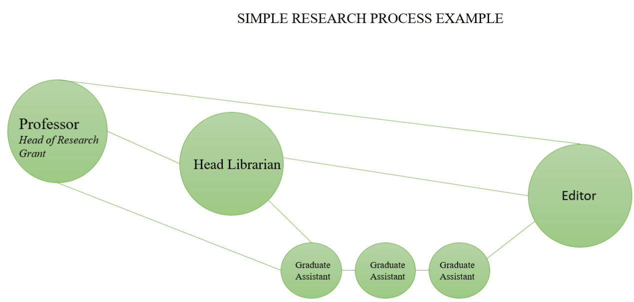


Figure 3 Simple Research Process Example

One key factor of learning organizations is that regardless of the structure you have, all of them must have some form of **departmentalization**. This applies to different structures maintaining control of different departments (i.e. academics, human resources, marketing, residences, etc.), and represent unique structures that pertain to their specific sector[11]. Departmentalization is important when talking about how a learning organization functions. It is the efficient process of departments that collaborates as a whole to run a college, university, or professional school system.

Professor Gerald Kimani produced much information on higher educational institutes and how they run as places of learning. Kimani uses the term “educational organizations” and describes them as “individuals…in a specific place or institution whose purpose is to impart knowledge, skills and attitudes to students or pupils in order to achieve pre-determined educational objectives and goals"[12]. The major factors working within learning organizations are the acts of creating, implementing, and revising educational policy.

Educational policy is about creating, implementing, and revising factors of class size, teacher education, teaching methods, and curriculum. Kimani describes educational policy as the process of asking questions and seeking answers about the meaning of education inside of an institution[12]. This ties into the management of education with the planning, directing, controlling, and coordinating of a specific educational policy. The method of implementing an educational policy follows a scientific method of planning, implementing, monitoring, reviewing, and continual improving (Figure 4).

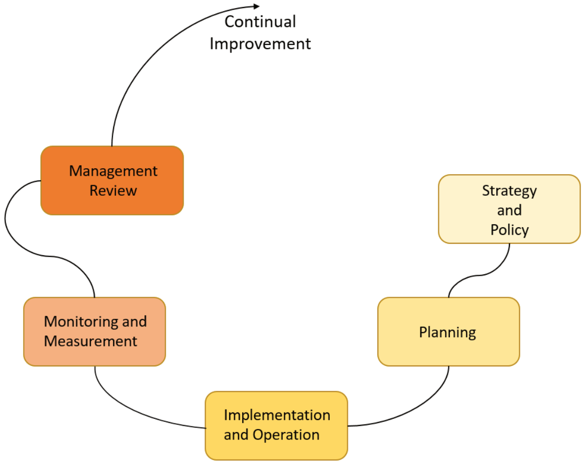


Figure 4 Stages of Educational Policy *(Source: Gerald Kimani, Educational Management)*

Review Questions

1. What is the definition of learning organizations?
2. What are the differences between a mechanistic and an organic organization?
3. How would you define educational policy and describe its stages of development?

1.3 Self-Awareness in Leadership and Management

*Pictured is **Abraham Maslow**, who was an American psychologist known for his Heiarchy of Needs Theory (Image Retrieved from https://www.verywellmind.com/biography-of-abraham-maslow-1908-1970-2795524)*

What does it mean to be self-aware? **Self-awareness** is the inherent knowledge of one's character, emotions, and motivations, and abilities to quantify an ability for introspection. Originally, self-awareness came from the idea of self-actualization by Abraham Maslow in his development of the Hierarchy of Needs Theory. Maslow outlined five needs, with the fifth need being self-actualization:

> "[Self-actualization] is the final group of needs which is usually at the top of hierarchy. It is the need to develop fully and to realize one's capacities and potentialities to the fullest extent possible. This is activated after all other needs have been fulfilled."[13]

Maslow's view of self-actualization is that only by learning and progression through the other needs, can one's self-actualization or self-awareness be fulfilled. It would be fair to make the claim that in the world of leadership and management, that awareness of leadership and management capabilities must be achieved before becoming a truly self-aware leader or manager. But how does one become self-aware as a leader or manager? Kimani believes that the ability starts with the capacity to motivate others through passion and goals[14]; in a sense, motivation must be a mix of conscious and unconscious factors of needs, rewards, and expectations.

The role of self-awareness within the learning organization is vital. The ability as a leader and manager is important in the realm of expectations. Whether in faculty or administration, the ability to understand the needs of self to be motivated in front of peers is a valuable asset when developing learning to pass on to students. The mutual expectation between the administration and faculty is an important organizational dynamic in any learning organization.

How can self-awareness be measured? The key to that is taking a deep look at a person's abilities, drawing from past experiences; then, making effective choices on the expectations you desire to achieve. When acknowledging abilities, and tailoring those abilities to build effective expectations, becoming self-aware will ensue.

The most common way for an individual to accomplish a greater sense of self awareness is through reflection. Using the Johari Window exercise, reflection upon the past as a manager is helpful. Figure 6 provides a template for this exercise.

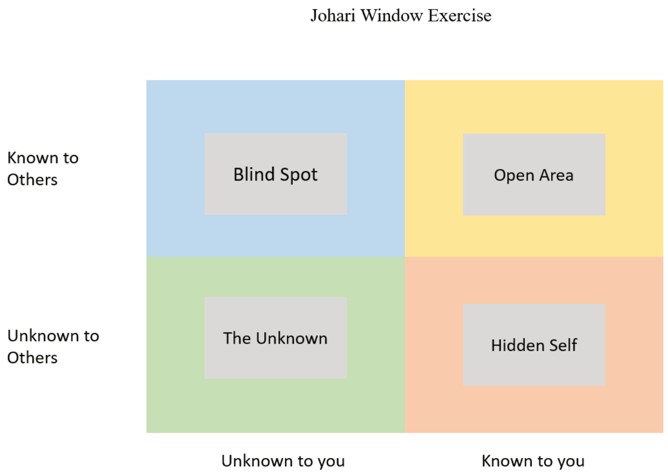


Figure 6: Johari Window Exercise. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition.)*

Four boxes are created which outline an individual's open area, hidden self, unknown, and blind spot. From there, organize the boxes in reference to what is known to the person, and unknown to you, and what is known and unknown to others[15]. The Johari Window exercise is used to figure out how an individual's past experiences shape her or his future managerial experiences. In addition, it provides insight to multiple parties on how one individual will manage, or how one can manage a specific individual. At first, it may be difficult due to the reluctant nature to be candid about one's self-awareness. That is why it is important to focus on the area of the blind spot, and to gain helpful and constructive feedback from family, friends, and co-workers. However uncomfortable it is to pursue, it can be beneficial in helping to develop self-awareness.

An interactive or media element has been excluded from this version of the text. You can view it online here: https://ecampusontario.pressbooks.pub/educationleadershipmanagement/?p=270

1.4 What is the General View of Leadership and Management?

Many have a view of leadership and management, predominantly in the differences between the two. Simon Priest describes leadership as a layer under management, in that under every manager is a leader who needs to be cultivated. This distinction is the idea that management gets things achieved through systems, while leadership gets things achieved with people[16].

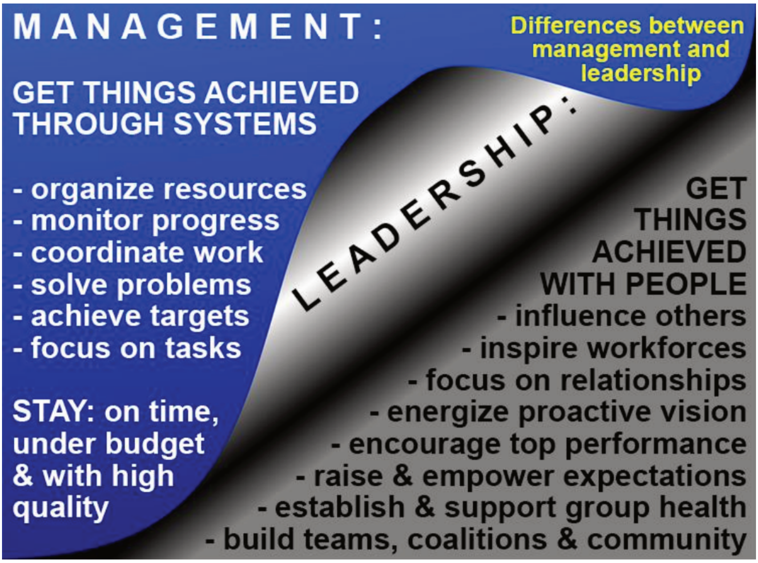


Figure 5 Simon Priest Definition of Leadership and Management
(Source: Simon Priest URL: http://simonpriest.altervista.org/LM.html

This systematic view of management and leadership presents insight on how many people view both categories. Figure 6 offers some common descriptions of how leadership, management, and the area in between are seen by the general public.

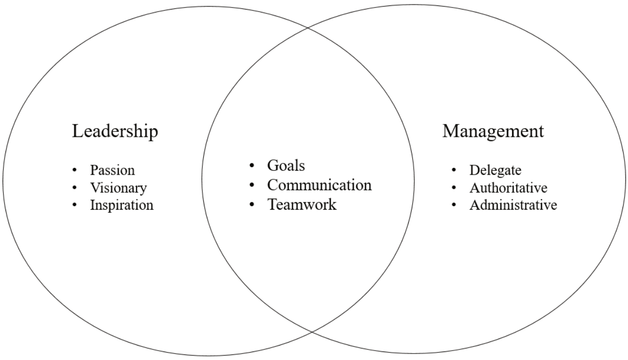


Figure 6 Separate and Similar Descriptors of Leadership and Management

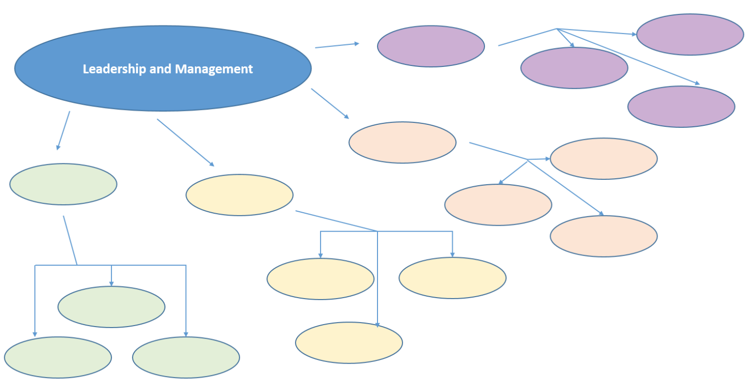
The differences in how one sees management and leadership is dependent on experience. One who might have had an overbearing manager in a previous workplace may be seen as authoritative, where another person who does more delegating in organizing resources to complete the job would be considered to be a facilitator. Differences in leaders can be encountered with one who is passionate about the work in the here-and-now, compared to another who is a visionary, constantly looking to the future for success. Experience is the main way management and leadership are interpreted and perceived.

The main factor is that many people will experience management and leadership on different levels based on how they are perceiving management and leadership. One way to help understand the complex nature of leadership and management is understand the organizational complexity that is present within organizations through the use of metaphors and creating an interconnected web of ideas to develop your own understanding of leadership and management based on your experience. Experience is the main way management and leadership are interpreted and perceived.

One way to understand the complex nature of leadership and management is to grasp the complexity that is present within organizations through the use of metaphors to create an interconnected web of ideas to develop your own understanding of leadership and management based on your experiences.

Activity: Leadership and Management Concept Map

- Feel free to use this template or create your own concept map. If possible, find connections between your ideas of leadership and management.



1.5 The Use of Metaphors to Understand Organizational Complexity

When using metaphors to understand organizational complexity, it is important to grasp the four basic structures of an organization: simple, functional, multidivisional, and matrix. Similar to the structures of formal and informal organizations previously discussed in 1.2, these four structures draw a clear outline of how an organization works and how the complexity varies between each organization. Edwards outlines the four structures and explains how each differ from one another[17]:

Executives rely on vertical and horizontal linkages to create a structure that they hope will match the firm's needs. While no two organizational structures are exactly alike, four general types of structures are available to executives: simple, functional, multi-divisional, and matrix.	
Simple Structure	Simple structures do not rely on formal systems of division of labour, and organizational charts are not generally needed. If the firm is a sole proprietorship, one person performs all of the tasks that the organization needs to accomplish. Consequently, this structure is common for many small businesses.
Functional Structure	Within a functional structure, employees are divided into departments where each handles activities related to a functional area of the business, such as marketing, production, human resources, information technology, and customer service.
Multi-divisional Structure	In this type of structure, employees are divided into departments based on product areas and/or geographic regions. The Jim Pattison Group, for example, has nine product divisions; Food and Beverage, Media, Entertainment, Automotive and Agriculture, Periodical Distribution and Marketing, Signs, Packaging, Forest Products and Port Service, and Investment and Partnerships.

Matrix Structure	Firms that engage in projects of limited duration often use a matrix structure where employees can be put on different teams to maximize creativity and idea flow. As parodied in the movie *Office Space*, this structure is common in high tech and engineering firms.

Figure 7. The Four Main Organizational Structures (Source: Janice Edwards, Managing Strategic Management – 1st Canadian Edition, Under CC BY 4.0 license)

Metaphors can be used to understand organizational complexity by how companies interact within the specific structures. Gareth Morgan (2011) explains in his work, *Images of an Organization,* that metaphors, in understanding organizational complexity, provide both partial and conflicting insights, which relies on the "interplay of multiple perspectives"[18]. Morgan describes eight metaphors of an organization[19]:

1. Organizations as Machines (Mechanization)
2. Organizations as Organisms (Nature)
3. Organizations as Brains (Self-Organization)
4. Organizations as Cultures (Social Reality)
5. Organizations as Political Systems (Interest, Conflict and Power)
6. Organizations as Psychic Prisons (Plato's Allegory of the Cave)
7. Organizations as Flux and Transformation (Logistics of Change)
8. Organizations as Domination (The Ugly Face)

These metaphors describe how organizations are viewed based on attributes that surround our everyday life. Be it natural, aesthetic, social, cultural, or ethical, the idea is that metaphors will help the understanding of how these operations function on many structural levels. Essentially, the farmer who runs his or her own produce stand in a simple structure, to the CEO of a multi-national fast-food corporation in a multi-divisional structure can develop understandings of organizational complexity through the use of a well-described metaphor.

What is an organization like? Taking a naturalistic approach, an organization is like a budding flower. An industrial approach would be a well-oiled machine. More specifically, Morgan's use of organizations is creating a social or political system. This is done by noting that organizations create a social reality which have specific interests, conflicts, and power[19].

The visual representation of metaphors is important to understand organizational complexity. Create a mind map like one shown here in Figure 8:

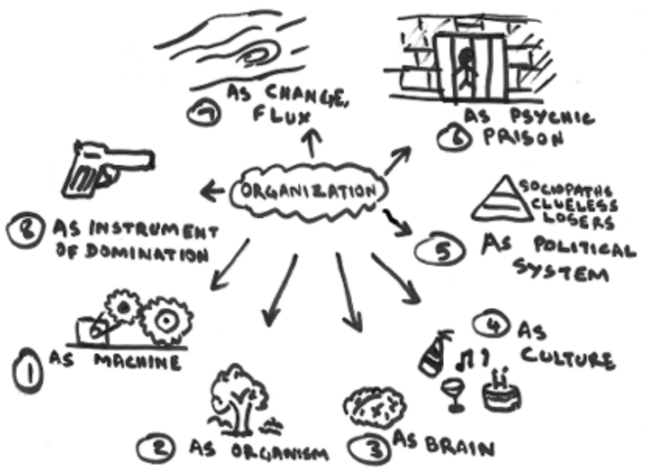


Figure 8. Visual Representation of The Eight Metaphors of an Organization by Gareth Morgan *(Source: Venkatesh Rao, July 13, 2010 URL: https://www.ribbonfarm.com/2010/07/13/the-eight-metaphors-of-organization/*

Review Questions

1. What are the four basic structures of an organization, and what are their attributes?
2. How would you define organizational complexity?
3. Describe self-awareness and how it is important to understand organizational complexity.

Conclusion

A review of this chapter's major conclusions, include:

1. Classical definitions outline leadership as the social influence of the relationship between two or more persons who depend on each other to attain certain mutual goals. Management is the process of planning, organizing, directing, and controlling the activities of employees.
2. A learning organization is any establishment that fosters growth through learning, and continues to expand that growth in the future. A learning organization is either organic or mechanistic.
3. Self-awareness is cultivated through Maslow's understanding of self-actualization. Leaders and managers need to have expectations of themselves and others in order to be self-aware.
4. The view of leadership and management is based on experiences throughout life.
5. Many metaphors can be used to describe organizational complexity. It depends on how the individual sees the organization in relation to her or his world view.

Moving through this journey of leadership and management in learning organizations, it is important to understand how past knowledge of leadership and management in your lifetime affects perceptions. These examples can act as a reference to your own understanding of leadership and management, and how your previous encounters relate to understandings within a learning organization.

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PART II

CHAPTER 2: MANAGEMENT THEORIES AND PRACTICE

Dusty Baker *is a professional baseball manager, and is noted as being a true "players' manager."*

This chapter will discuss some classical and contemporary theories present in the world of management. In addition, it will focus on the work of how managers function within the world of organizations, more succinctly, learning organizations. It will also consider some contemporary management theories that have become present in the modern workforce. This chapter will develop a more in-depth view into the world of management and how management relates to the learning organization.

The learning outcomes for this chapter are:

1. Describe the historical background of the classical management theories and their relevance to the learning organization.
2. Describe the functions of management within organizations, and theories that apply to the ideal functions of management.
3. Compare, contrast, and critique the contemporary management theories to get a broad understanding of management within a modern learning organization.

Chapter Tips:

- Attempt to track a lineage of management theories with regard to the time they were created.
- Attempt to understand why there are management theories within learning organizations.
- Note technological advancements and their effects on management theory.

2.1 Classical Management Theories

The world of organizations is practical. As previously discussed, management can be regarded as a simple micro approach where the rule a + b = c is a model. The theoretical side is used to understand how specific management theories relate to learning organizations. According to Kimani, and his work on the background of organizations, we show that organizations have existed in society for many years, as found in the pre-twentieth-century works of Adam Smith[1], commonly referred to as the 'Father of Economics.' Understanding organizations comes from understanding management theory, and Kimani outlines four major management theories for the basis of organizations: bureaucratic theory, scientific management theory, behavioural management theory, and human relations theory. These four theories are generalized as the classical theories of managing organizations[1].

Bureaucratic Theory

When an organization is formed, it usually sets its rules based on its structure. Similar to what was discussed in chapter 1 with regard to formal and informal, mechanistic and organic organizations; one theory relates to the role of the formal and mechanistic organizations more than the others. **Bureaucratic theory** relates to the formal hierarchy in which many tasks are delegated to individuals and departments. They are also held together by a central administration[1]. This theory was developed by Max Weber (1864-1920), who was a German historian and sociologist, and is regarded as the "father of bureaucracy"[4].

This theory is quite popular, and is used by a host of both private and public institutions. Kimani states that universities and other schools rely on bureaucracies to function, as the compatibility of this function is relevant in the delegation of tasks[1]. The compatibility decided upon (usually by a central command) is passed down to subordinates who carry the same compatibility to their subordinates and so on. The bureaucratic model, theoretically, has a hierarchical structure along with the specialized departments, making a clear outline for **division of labour**, which is the defining and break-down of work into well-defined tasks, and delegated to be manageable[1]. The idea of division of labour is a key factor in the bureaucratic theory.

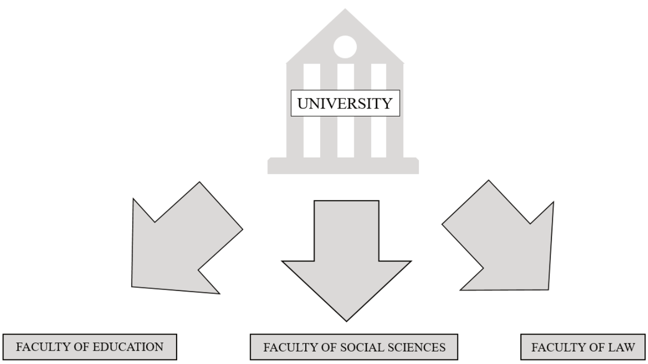

Figure 1: Example of hierarchy and division of labor in a university system

Scientific Management Theory

In the modern world of technological advancement, it is no surprise that the push for understanding within organizations is the key to success. When looking at the sport of baseball in 2019, compared to the sport of baseball in 1999, there is a great influence of statistical probability and analytics introduced to the game, compared to a decade earlier. This is due to the popularity of Sabermetrics, which is the application of statistical analysis to baseball records to evaluate and compare the performance of individual players.. This idea relates to **scientific management theory**, developed by Fredrick Taylor. It helps to improve an organization's level of task completion through scientific, engineering, and mathematical analysis[1]. Much like how Sabermetrics cuts through the aesthetics of baseball and focuses on the numbers, scientific management theory cuts through the aesthetics of production and focuses on the increase of production and value.

This theory can be used in learning organizations due to its ability to be mathematically savvy to produce the best results for an institution. Colleges and universities may use statistics such as graduation rates, acceptance rates, and research tracking to develop, change or keep their current methods, in addition, the use of the statistics helps to compare against other institutions.

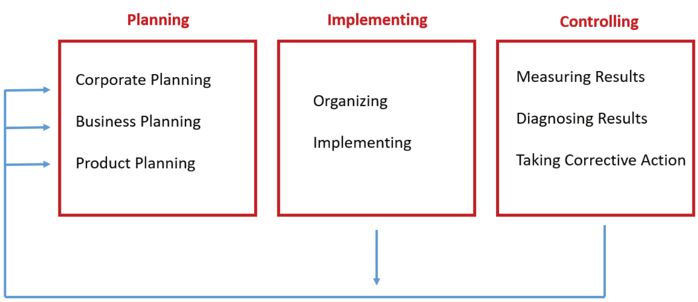

Figure 2: Scientific management theory process *(Source: Gerald Kimani, Educational Management)*

The scientific management theory is closely related to the definition of management discussed in chapter one. The theory can be harsh, as employees are considered more widgets than humans. However, Henri Fayol came along and developed the six roles of management. This brought in a more humanistic approach to the understanding of scientific management, allowing humans to be humans and focusing more on managing situations and using people to help in the process. The six roles of management are as follows[2]:

1. Forecasting
2. Planning
3. Organizing
4. Commanding
5. Coordinating
6. Controlling

Behavioral Management Theory

In the mid-twentieth-century, one theory was presented that has worked to completely remove itself from scientific theory. **Behavioral management theory**, also known as the social science movement, uses the concept that all approaches to the workplace should be in the best interest of both company and workers[3]. This theory was developed by Chester Barnhard, in the 1940's, as a way for workers to be viewed as psychological and social beings[3]. Essentially, there is no separation between 'human being' and 'worker' as they are one in the same, and that, by following this concept, it would lead to success within a workplace.

The idea of behavioral management is about understanding the idea that managers should comprehend human or worker needs within an organization. Many theorists wanted to find out how the use of behavioral management theory would function within workplaces. One of the main theorists being Elton Mayo, and his groundbreaking experiment: *The Hawthorne Studies*, which will be discussed further in chapter ten about communication. The Hawthorne experiment essentially used special privileges, pay rewards, even company provided lunches in ways to increase employee psychological well-being, and eventually employee productivity[3].

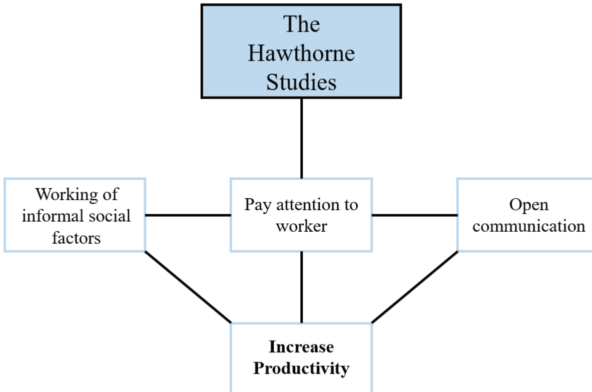

Figure 3: The Hawthorne Study by Elton Mayo *(Source: Gerald Kimani, Educational Management)*

Behavioral management theory had a great impact on learning organizations, as it provided a new view on how administrators come into learning organizations. There are two factors which are integral to the introduction of behavioral management within learning organizations, such as administrators at colleges and universities[3]:

1. Administrators can emerge from different disciplines (i.e. business, social sciences, and the arts), not specifically from education.
2. Along with specialized knowledge of education, administrators must have an **interdisciplinary** grasp of social sciences, such as economics and government.

In most education faculties, both undergraduate and graduate students develop content that is considered interdisciplinary (i.e. covering multiple branches of knowledge and understanding). This allows educational administrators the ability to take on a more holistic approach, which will lead to a better understanding of the 'human-worker'. Even when administrators and professors develop courses, interdisciplinary theory is used in development (Figure 4).

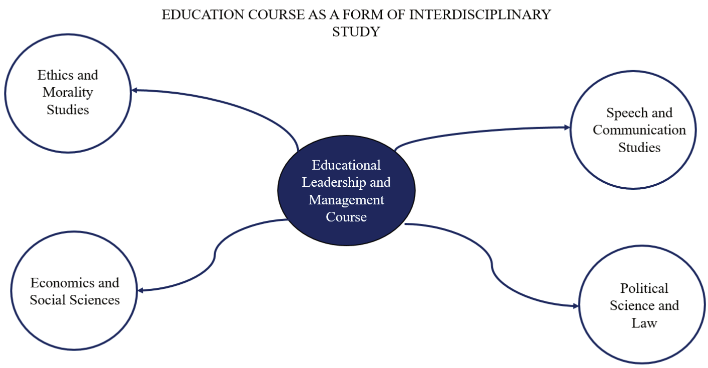

Figure 4: Education course as a form of interdisciplinary study

Human Relations Theory

Now that the worker has become less of a product with no needs, to a human worker with needs and desires, it surprising that it took until the twentieth-century to realize that the people who work in a factory do not become less of a psychological being inside or outside the factory. Mary Parker Follet developed the **human relations theory** with regard to employees having a more satisfying life, and they can solve conflicts through a process of democracy and conversation. There are six points in which democratic problem solving happen in human relations theory[3]:

1. Listening to each other's views
2. Accepting other view points
3. Integrating viewpoints in pursuit of a common goal
4. Coordinating must be achieved in the early stages

5. Coordinating must have reciprocal understanding
6. Coordinating is a continual process.

Within learning organizations, we have seen the advancement of programs to help with human relations inside the walls of the establishments. From seminars discussing productivity, improving morale, and good ethical actions, to open meetings where brainstorming happens, the impact has given employees a chance to offer a holistic influence on organizations.

The idea of human relations draws comparisons to Abraham Maslow, and his theory on self-actualization (Figure 5), which was discussed in chapter one. Human relations theory allows employees to develop a sense of self-awareness to understand their places within a company and their influence.

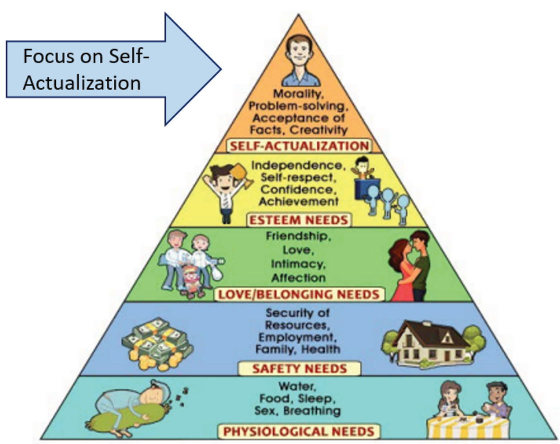

Figure 5: Abraham Maslow Theory of Needs *(Source: Gerald Kimani, Educational Management)*

Review Questions:

1. What are the four different classical management theories?
2. What was the famous study conducted to develop an understanding of behavioural management theory?
3. What is the final and highest step in Abraham Maslow's hierarchy of needs theory?

2.2 Functions of Management in Organizations

Planning, logistics controlling, and leading the ship into the harbour are all aspects of managing with any organization. Image: Marlow Navigation Crew & Ship Management, This file is licensed under the Creative Commons Attribution-Share Alike 4.0 International license. https://commons.wikimedia.org/wiki/File:Marlow_Navigation_Crew_%26_Ship_Management.jpg

Now that a host of classical theories have been presented, the focus will shift to the functions of management within learning organizations. This leads to the general definition of management in which an individual plans, controls, leads, and organizes tasks, leading towards successful goals pertinent to the organizations mission, vision, and values. Within a learning organization, the planning, controlling, leading, and organizing is the same. It is the objectives that are different (i.e. creating learning and knowledge instead of widgets and profit). Figure 6 outlines the management function as it relates to the learning organization[4].

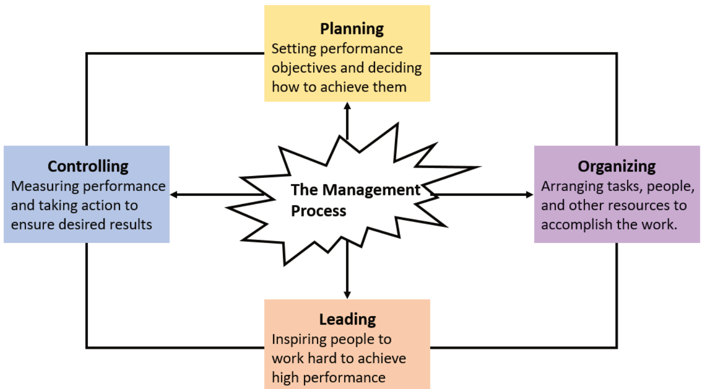

Figure 6: Functions of Management. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition.)*

What does this mean for the roles of managers within learning organizations? First, it means that they must be flexible in the different roles required in an organization. Schmemerhorn and Wright outline three roles a manager must take on to be successful within learning organizations[4].

Informational Roles	Interpersonal Roles	Decisional Roles
How a manager exchanges and processes information • Monitor • Disseminator • Spokesperson	How a manager interacts with other people • Figurehead • Leader • Liaison	How a manager uses information in decision-making • Negotiator • Disturbance handler • Resource allocator • Entrepreneur

Figure 7: Roles of a Manager. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition)*

With these roles come certain skills that employees would possess depending on their level in the management system or hierarchy. Notice that as they move up the hierarchy of management level or capability, the more ambiguous the skill set. Essentially, moving from lower level to a higher level, the skill moves from applied to theoretical through the essential skills[4].

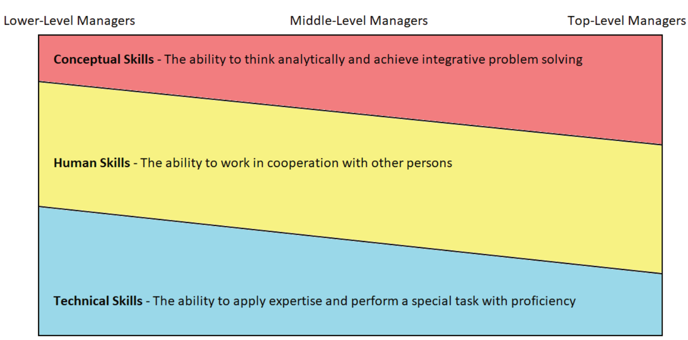

Figure 8: Essential Skills. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition)*

In the last section, some key classical theories that pertain to management were discussed. There is one theory that relates to the functions of management within organizations, especially learning organizations. It has a great deal of relevance, given that its characteristics blend nicely with the flexibility of managers within learning organizations.

Theory X and Theory Y

Douglas McGregor's 1960 theoretical concept is widely regarded in many organizational circles, and follows two distinct styles of management called theory x and theory y[5]:

- **Theory X:** Managers who believe that subordinates generally dislike work, lack ambition, lack responsibility, and prefer to be led rather than lead.
- **Theory Y:** Managers who believe that subordinates are willing to work, accept responsibility, and are capable of self-control and self-direction.

This is an interesting concept, especially in the realm of managerial function within organizations. Regarding planning, those with more theory x have a worldview that will be shaped by planning for subordinates, rather than planning with subordinates. Likewise, those who are more theory y, will be likely to focus on leading staff and leave the control to the subordinates. Looking at the essential skills, there can be a hypothesis where McGregor's theory would be placed, given the level of management and the associated skill. This is why McGregor's theory fits well with the functions of management within organizations, as it provides a clear view on how to tailor each person's management style.

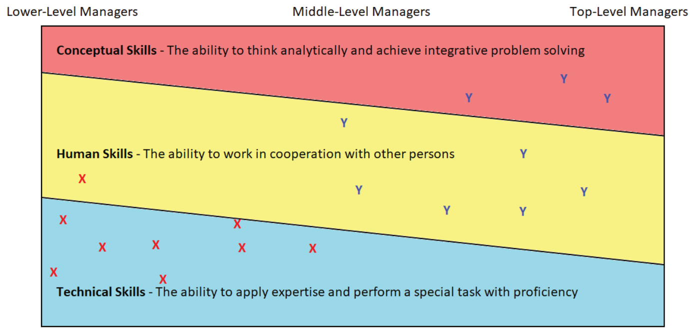

Figure 9: Essential Skills with Theory X and Y Scatter.

Inside the learning organization, many functions of management can be used and different management theories can be applied to those functions. It depends on the different organizational structure and the how managers want to develop a specific mission, vision, and values. For example, inside of an educational institution, the mission would be to enhance learning, with a vision to create leaders of tomorrow. How could that be done? Would there be a heavy emphasis on controlling the processes to force a direction of learning for students, or release the reigns and accept the notion that students want to be at the institution to learn and to become leaders? The answer might not be clear, but reflection on the organization should develop the way a manager functions within it.

Review Questions:

1. What are the four functions of management, and what does each function represent?
2. What are three organizational roles within an organization? What are their characteristics?
3. What are the management theories of X and Y?
4. What are the 3 skills of all lower, middle, and top level managers? Describe them.

2.3 Contemporary Management Theories

Now that there is a grasp on classical management theory, do these theories still fit in a contemporary marketplace? Perhaps, adhering to strict theoretical concepts, the classical theories will always be a base, but they need to be associated with many contemporary factors.

Technology

Today, many organizations are being reformed where a host of technological concepts are rising to the top[6]. In a modern market, computerized technology has been the biggest advancement to work in the sense of making work easier and more effective. Globally, it has had a huge impact, considering that modern technology extends to everywhere on Earth. Focusing on the learning organization, much has changed since the advancement of technology. For example, take this book. A healthy prediction would be that about 99% of students reading this on some form of personal computer, handheld laptop, tablet, or even a smartphone. This leads to the question that in this world of expanding technology, are classical theories obsolete in this new age of contemporary technological management? The answer relies on the comparison and contrast of the classical and the contemporary.

Take the bureaucratic model. Of course, the systems of hierarchy will remain with the division of labour. However, a manager who uses expert power in the form of knowledge to a subordinate can be equalized with the advancement of technology. Essentially, the employee with the smartphone or tablet can find answers to certain organizational questions just as quickly and effectively as the boss or manager. With this concept at its most extreme, what is the difference between a manager and an employee at this point other than a title? Technology has the opportunity to change the bureaucratic model into more of a bureaucratic matrix that focuses on specialization in a more decentralized organization. As an example, the president of a university is the head of the institution, but has to delegate, and at times defer, to the heads in the areas of other administrations (i.e. information technology, human resources , student affairs etc.).

Technology has moved society into rethinking and expanding on the theories of bureaucratic and scientific management, and into an advanced version of behavioral and human relations theory. The form of decentralization and human coordination will be effective attributes in a modern organization. Professor Jay Conger, of McGill University, claims that the advancement of new technologies will require managers to be capable of coordinating in a highly decentralized organization, and that the changes will demand not only more leadership and management, but newer forms of leadership and management[7]. Ultimately, a more expanded thinking approach, compared to a methodological approach, may be needed. Given the advancement of technology that is currently here, and does not seem to be slowing down at any rate. Technology within education will be discussed more in-depth with Communication in Chapter 10.

Diversity

Diversity has become a widely used term in recent years. The fact is that the workplace in the 21st century is more diverse now than it has ever been. People are living longer, different genders are engaged in the workplace, and different members of society are actively involved together. This demands a knowledge of diversity, whether or not a classical theory can adapt to the changing notion of diversity.

Diversity in management focuses on people, with their backgrounds and needs within an organization. For example, a university can have a specific department (faculty of social sciences) with members from different generations (millennials, generation x, and baby boomers). This idea has been replicated many times throughout case studies, with the pre-determined idea that an organization without diversity will produce differing views and challenges between the generations. However, to have an effective organization, all groups need to be treated fairly, and seen as valued within the organization[8]. This is referred to as **managing diversity**. In many ways, managing diversity relates to behavioural management by doing what is best to really pay attention to the workers needs within the organization.

Ultimately, what is needed is to rethink what diversity is and how it is present in the many facets within the organization. In order for a modern organization to run effectively, it must use a more advanced approach of a behavioural model that embraces the diverse contrasts within institutions. Essentially, it goes beyond just listening to the employee. It attempts to listen to the employee based on her or his specific needs. Diversity will be discussed further in Chapter 11: Multicultural Leadership.

<u>Globalization</u>

The term globalization became more common after the fall of the Berlin Wall in 1989. With an increase in open borders and advancement in technology, businesses and corporations decided to expand in the new global marketplace. However, as the world moves steadfast through the 21st century, there are some troubling trends emerging within the global economy. In 2018, the Global

Risk Perception Survey (GRPS) conducted a study which listed four trends in the global, external environment[9]:

1. Persistent inequality and unfairness
2. Domestic and international policy tensions
3. Environmental dangers
4. Cyber vulnerabilities

There is a bleak outlook by the authors of this survey, and they further state that rigid, hierarchical structures will find no place in a modern high impact environment[9]. Perhaps this is a challenge to the bureaucratic and scientific models. However, maybe this outlook can be solidified. If the idea of a hierarchical structure that works top down is no longer needed in the globalized marketplace, what about the hierarchy that moves outwards rather than top down? When discussing the organizational environment, it would be remiss to neglect all the outside **dynamic forces** that effect organizations in a global marketplace. These dynamic forces are listed as follows[10]:

1. Economic Environment
2. Legal-Political Environment
3. Technological Environment
4. Socio-Cultural Environment
5. Natural Environment

These dynamic forces are outside of the central organization, and thus outside of organizational control. Although the forces are external to the control of the institution, it can effectively change policies to stay ahead of the curve of dynamic forces. For example, a large fast food chain may introduce a 'beyond meat' hamburger to meet the needs of a changing natural and socio-cultural environment. Challenges can emerge with this format. however. For example, that fast food company may bring in order kiosk, which would benefit the technological environment, but may be a deterrent to the economic environment. It remains a constant tug-of-war to ensure a company in a global marketplace does its duty to maintain these dynamic forces in order to foster a positive organizational and social outlook.

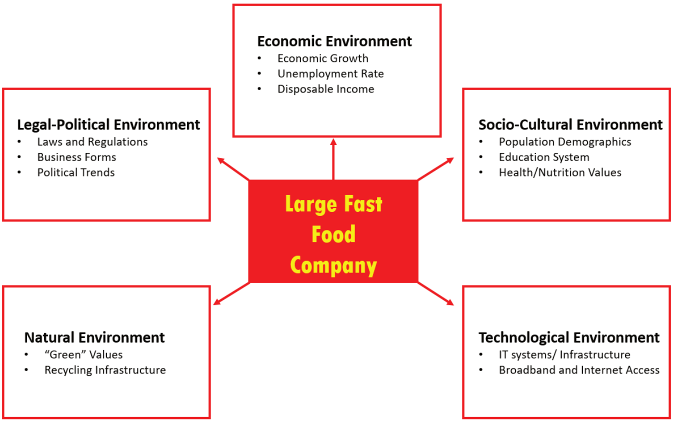

Figure 7: Dynamic Forces on Organizations in a Globalized Economy. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition)*

The dynamic forces, in many ways, can act as a solution to the troubles in the GRPS survey. Acknowledging the risk that is present and putting systems in place to combat the risks is the main idea behind a globalized organization.

How does this fit within the learning organization? The idea of moving outward may be a beneficial and necessary outcome to keep up in a globalized educational marketplace. With more and more colleges and universities having off-site and web campuses in other cities and countries (*technological*), a new generation entering post-secondary education (*socio-cultural*), a growing population (*economic*), political polarization (*legal-political*), and green initiatives (*natural*), learning organizations, much like the large fast food company will need to effectively manage these dynamic forces to maintain an advantage in a globalized marketplace.

Activity: Management Factors

- Match one of the scenarios to one of the five factors below

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Conclusion

This chapter offered a history of management through the classical theories and the contemporary theories of management. In addition, the Johari Window Exercise offered a chance for learning about personal management styles.

A review of this chapter's major conclusions, include:

1. The classical management theories of bureaucratic, scientific, behavioral, and human relations offer different approaches to management on a spectrum ranging from product to employee.
2. Self-awareness is just as much about finding out about what you know and what managers know and what are their blind spots only known by others. Constructive feedback on past experiences is very beneficial for developing self-awareness.
3. Classical management theory has evolved in the modern marketplace through technology, diversity, and globalization. Learning organizations are following these trends to keep ahead of the curve in an expanding organizational environment.

Management within a learning organization fits many categories, from bureaucratic to human relations, and from technological to global. Managers in learning organizations subscribe to these managerial theories to further develop their core competencies of communication, teamwork, self-management, leadership, critical thinking, and professionalism. Chapter 3 will shift our focus to leadership styles and the roles of leaders in learning organizations.

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PART III

CHAPTER 3: LEADERSHIP STYLES, ROLES, AND TRAITS

Individuals who display traits of leadership tend to make their own path, and motivate others to follow them.

In the last chapter, all the theoretical concepts in relation to management were introduced. The focus will shift to leadership and the different styles, roles, and traits that make up a leader. In addition, we will discuss the nature of power and how to use it effectively in leadership roles will be addressed.

The learning outcomes for this chapter are:

1. Classify and explain the four different leadership styles presented in this chapter.
2. Define the roles of a leader within a learning organization and how managers are shaped through different

leadership styles.

3. Compare and contrast the different studies done on the behavioural traits of leadership within learning organizations.
4. Critique the understanding of power within leadership, and describe how power can be used.

Chapter Tips:

- Use some self reflection on what type of leadership style you follow.
- Engage in class discussion on leadership theories to get a feel of leadership styles.
- Develop your own understanding of power in relation to what the text outlines.

3.1 Leadership Styles

As discussed in chapter one, leadership is the social relationship that obtains certain goals within an organization though a mission, vision, and values. In these relationships it is common for leaders to exemplify a specific type of behaviour to direct reports or subordinates. This behaviour is called a leadership style, and below is an outline of the four major leadership styles prevalent in organizations:

- **Autocratic**
- **Participative**
- **Free-Reign (Laissez-Faire)**
- **Democratic**

Within many ethical frameworks discussing how humans in society run a state, the concept of an autocracy may be troubling. Some may say the same about autocratic leaders. **Autocratic leaders** are directive leaders who take very little input or discussion from subordinates[1]. In this modern day, global collaboration, the concept of the autocratic leader may seem cold and dated; however, autocratic leaders tend to look at the systems and find a path of least resistance to success based on their knowledge. It is not that autocratic leaders do not care about their staff as they treat staff like any other people. It just comes down to how to run organizational systems, using their own expert knowledge to lead their team.

In today's environment, most businesses are looking for individuals who will embrace a more global, inclusive approach. **Participative leaders** fit this mold as they are individuals who share the decision making process with other employees and embrace a brainstorming discussion on organizational issues[1]. In many ways, the participative leader within a learning organization tends to be the best fit. When fostering learning with students for example, engaging in a participative atmosphere helps learning. This approach is commonly found in many successful organizations[1].

Looking at leadership along the spectrum, on one side there is the autocratic style, and on the other is free-reign. Free-reign or **lassiez-faire** (French: Leave it alone) is a leadership style in which managers leave the control and decision making to their employees[1]. As one person may think the autocratic style is to strict, one may think the lassiez-faire style would lead to complete corporate anarchy. However, the idea behind the free-reign style still encompasses some control. Essentially, the employees have freedom to pursue their work as they see fit, so long as they stay within the confines of existing company ethics and policies[1].

In the same vein as participative leaders, **democratic leaders** embrace input from all members and have a vote on specific decisions[1]. An example would be a head of a not-for-profit board who chooses to have all board members vote on specific outcomes. Inside the democratic system there are two outlooks of running it. Figure 1 shows the different characteristics of **consensual leaders** and **consultative leaders**[1].

Consensual Leadership	Consultative Leadership
• Encourage discussion about issues. • Require parties involved to make final decisions.	• Encourage discussion about issues. • Leader retains final authority over decision making process.

Figure 1: Consensual and Consultative Leadership.
(Attribution: Copyright Rice University, OpenStax, under CC-BY 4.0 license)

Ultimately, the leadership style that is used depends on the organization and the relationships present within it. The responsibility relies on managers to adjust their leadership styles in relation to the organizational makeup, goals, and objectives. This follows the concept of the Hershey-Blanchard Situational Leadership Model in which successful leaders adjust their styles according to the organizational makeup[2]. There are four leadership sub-styles in the Hershey-Blanchard model, and they are listed in Figure 2:

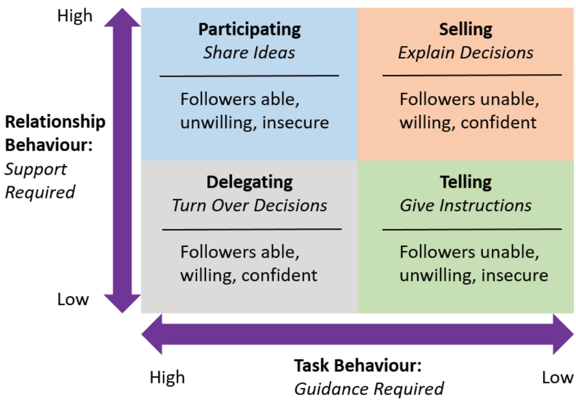

Figure 2: Hershey-Blanchard Situational Leadership Model. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition.)*

Review Questions:

1. What are the four leadership styles and their characteristics?
2. What are the difference between consensual and consultative leadership?
3. What are the four leadership sub-styles?

Activity: Hershey-Blanchard Fill in the Blanks

- Fill in the blanks with the correct answer according to the Hershey-Blanchard chart located at figure 2.

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3.2 Roles of a Leader

When looking at leadership styles, there is a macro, almost philosophical approach to leadership. Essentially, leaders might tie their leadership style to their own world-views. However, looking deeper into what is actually required to be leader, focusing on the micro details on what a leader can do on a systems' basis is important. Three areas have been outlined in which leaders should be efficient in creating. The roles of a leader are to create:

- Plans
- Goals
- Timelines

Planning is the act of creating an outline to guide operations in a direction of the organizations' mission, vision, and values. Within groups, many plans can be devised to get a company to its desired goals. Planning within a corporation is integral to its success, but planning should be dynamic and dependent on the institution's structure. Within establishments, there are six planning styles: hierarchical plans, strategic plans, frequency-of-use plans, time-frame plans, organizational-scope plans, and contingency plans[3].

Hierarchical plans	Strategic plans	Frequency-of-use plans	Time-frame plans	Organizational scope plans	Contingency plans
Administrative Plans: allocation of resources Operating Plans: day-to-day operations	Long term vision for the organization: reason for doing what you are doing Connection to Hierarchy: adhering to the mission, vision, and values	Standing Plan: company policies, rules and procedures Single-use plan: Programs, Projects, Budgets	Short: several hours to 1 year Medium: 1-5 years Long-Range: More than 5 years	Whole Organization: Scope is on complete organization (i.e. the whole University) Subsets within organization: Scope is on one area or department (i.e. Admissions and Enrollment)	Alternative Courses: Foreseen disruptions to the plan (i.e. budgetary restrictions Being prepared: for actions out of your control (i.e. downturn in the market, natural disaster)

Figure 3: Types of Organizational Plans. (Source: Copyright Rice University, OpenStax, under CC-BY 4.0 license)

Figure 4 shows some potential plans within learning organizations in relation to the planning styles.

Figure 4: Development of the Planning

Once the plans are created, the leader must decide what to do within the plans to reach the level desired. After planning comes creating **goals** or official goals which is described as an organization's general aims as expressed in public statements[3]. For example, using an institute of higher learning, might have a plan to be on the same level of increased enrollment as other institutions within the province or state. Therefore, the goal associated with this plan would be to increase out-of-province or out-of-state enrollment, perhaps even increasing international enrollment. This is one measure that uses goals to match the plan desired within the university.

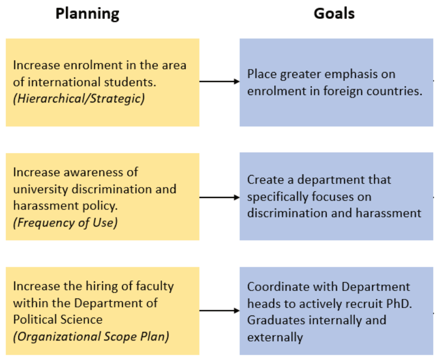


Figure 5: Goals Implemented

After creating the goal, the next phase is to develop a timeline for the goal. A **timeline** is a given set time to complete a task in order to be successful. To be a smart and effective time manager with goals, the dates must be realistic and achievable. Essentially, using the example of the university, the meeting in July 2019, and the goal is to increase enrollment by September 2019. That does not offer enough time for success. In many cases, it would instead cause more organizational problems. The timelines for goals must work well within plans, and be feasible to all members involved.

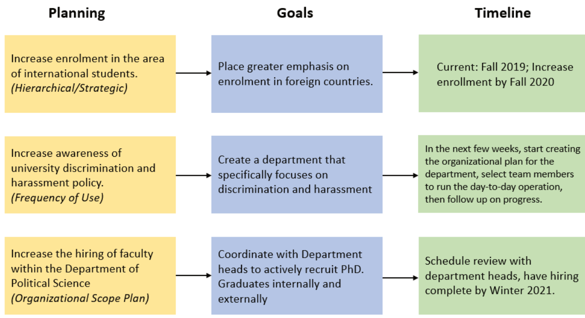


Figure 6: Timelines Added

Leadership Roles Shaped Through Leadership Characteristics

The roles within leadership through planning, goal creation, and timelines come from a framework of leadership characteristics. **Leadership characteristics** are specific traits within one leadership style which are used to plan projects and achieve goals. There are four characteristics that are important to the world of organizational leadership:

- Transformational
- Transactional
- Visionary
- Charismatic

Transformational leadership can be compared to a butterfly and the change the butterfly and the metamorphosis it goes through from chrysalis to butterfly. **Transformational leadership** heightens aspirations, shifts people and organizations to new levels[4]. This is in contrast to **Transactional leadership** or the action of changing styles, adjusting tasks, and allocating rewards to achieve a positive influence[4]. Scholars in the past have compared the different styles before, creating a dichotomy where only one fits. Another way to look at the concepts of transformational and transactional leadership is that they can both be required depending on the context or situation within the organization. Based on the characteristic, it must be done in a framework of **emotional intelligence**. Goleman describes emotional intelligence as the "ability to manage ourselves and our relationships effectively"[5]. Therefore, when using a transactional approach or a transformational approach, it must be used in the structure of high motivation, high self-awareness, and high social awareness.

As transformational leaders heighten aspirations, **visionary leaders** heighten aspirations through emotional and intellectual attractions to the leader's 'what-can-be' vision[6]. Through this vision, an organization can build upon it. One example would be a university president wanting her university to be the forefront of cancer research. Perhaps that is a goal five, maybe ten years down the road, but a truly visionary leader would never lose sight of that vision in order to find success.

Charismatic leadership is the ability to use charisma (compelling and inspirational charm) to influence members within an organization to bring about change or implement processes. Charismatic leadership closely mirrors the tenants of transformational leadership as the charismatic actions of an individual can greatly influence change within an organization. Max Weber describes charismatic leaders as ones who possess legitimate power which arises from "exceptional sanctity, heroism, or exemplary character"[6]. Charasmatic leaders can be seen as positive or negative influences on a company. These two individuals presented can show positive and negative influences[6]:

- **Positive:** Lee Iacocca – saved thousands of jobs during an economic downturn.
- **Negative:** David Koresh – led men, women, and children to

their death during the Waco massacre.

Regardless of the charismatic leader, charisma must be used within the confines of morality, ethics, and agreed upon organizational procedures. In chapter five, a deeper look into ethics and its meaning within organizational structures will be examined.

Review Questions:

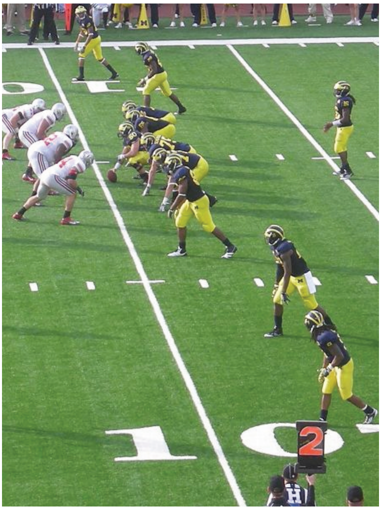
1. What is planning and what are the six types of planning styles?
2. What are the reasons for goals to exist in organizations?
3. What is the difference between transformative and transactional leadership?

3.3 Behavioural Traits of a Leader

Since charisma and vision are key traits of leaders, along with the ability to grow an organization, there are some classic, behavioural traits of a leader within a learning organization. A host of phrases that come to mind when thinking about what successful leadership include[7]:

- Drive
- Creativity
- Self-Confidence
- Cognitive Ability
- Job-Relevant Knowledge
- Motivation
- Flexibility
- Honesty and Integrity

The ability to encompass all of these behaviours is an interesting study in their effectiveness in organizations. During the 1940's, there were two institutions that sought to bring the understanding of behaviour and leadership together. It was more of a collaborative effort between these two schools, much different from how they see each other on the football field.



Although mortal enemies on the football field, both The Ohio State University and The University of Michigan sought to understand the behaviours of leaders through their respective studies.

The Ohio State Studies

In Columbus, Ohio, researchers were looking for a way to identify leadership behaviours in relation to performance. They developed two major set of behavioural structures[8]:

1. **Consideration**: the relationship-oriented behaviour of a leader: supportive, friendly, and representing the interest of the people
2. **Initiating Structure**: the task-oriented behaviour of a leader: planning, coordinating, and maintaining standards of performance

Through this study, it was found that leaders can differ from these two groupings in almost a binary way. One way to connect this to a learning organization is to look at a professor and how he or she teaches the class. Is the class more of a collaborative and supportive environment that represents the interest of the students, or is the class methodical, structural, and focuses on the grades or results of the students? Regardless of the framework, the Ohio State Studies outlined two critical frameworks for understanding different types of leadership, and the impact that leadership has on members within the organization[8].

The Michigan Studies

At the same time in Ann Arbor, Michigan, researchers were at work trying to identify leadership behaviours that differentiated effective from ineffective leaders. What was discovered were two types[8]:

1. **Job-Centered Behaviours:** devoted to supervisory functions such as planning, scheduling, and providing resources.
2. **Employee-Member-Centered Behaviours:** devoted to consideration and support for members within the organization.

Similarities between the Ohio State Study and the Michigan Study show ways that focus on leadership behaviours either being tailored toward the company or the individual. What the Michigan Study shows is a mix between care for the job, which is beneficial for the employees, or care for the employee, which is beneficial for the organization.

Both institutions created a logic that deduces behaviour to a central focus that encompasses all of the traits. Robert R. Blake and Jane S. Moulton developed a leadership grid to show all of the different styles reflected upon by the Ohio State and Michigan studies.

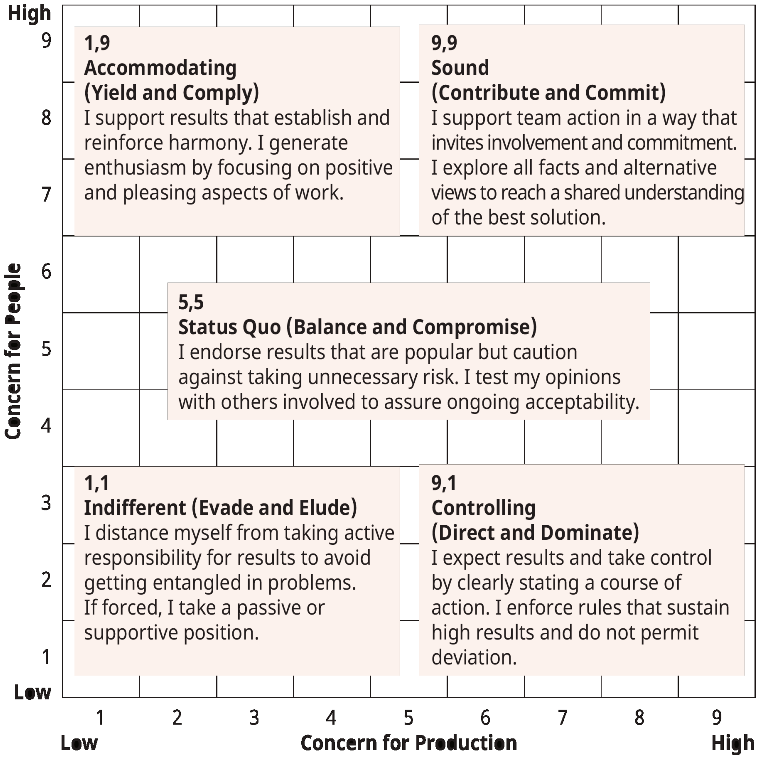


Figure 7: Blake and Mouton's Managerial Grid® *(Source: Adapted from R. McKee and B. Carlson. 1999. The Power to Change, p.16.)*

Activity: Case Study

- In this activity you will read the case study and provide answers in relation to the discussion questions.
- You can use the text box at the bottom of the page to input answers.
- If available, tackling this case will work better in groups and answering questions as a collective.
- This case comes from the CYFAR group at the University of Minnesota, link: https://cyfar.org/ilm_8_casestudy1

Leadership and Management Case Study #1

Laura is the associate director of a nonprofit agency that provides assistance to children and families. She is the head of a department that focuses on evaluating the skill-building programs the agency provides to families. She reports directly to the agency director. As a whole, the agency has been cautious in hiring this year because of increased competition for federal grant funding. However, they have also suffered high staff turn-over. Two directors, three key research staff, and one staff person from the finance department have left.

Laura has a demanding schedule that requires frequent travel. However, she supervises two managers who, in turn, are responsible for five staff members each. Both managers have been appointed within the last six months.

> **Manager 1:** Kelly has a specific background in research. She manages staff who provide research support to another department that delivers behavioural health services to youth. Kelly supports her staff and is very organized; however, she often takes a very black-and-white view of issues. Upper-level leadership values Kelly's latest research on the therapeutic division's services. Kelly is very motivated and driven, and expects the same from her staff.
>
> **Manager 2:** Linda has a strong background in social science research and evaluation. She manages staff who work on different projects within the agency. She is known as a problem solver and is extremely supportive of her staff. She is very organized and has a wealth of experience in evaluation of family services. Linda is very capable and can sometimes take on too much.

The managers are sensing that staff are becoming over-worked as everyone takes on increased responsibilities due to high staff turnover. They have also mentioned that Laura's "glass half-empty" conversation style leaves them feeling dejected. In addition, Laura has not shared budgets with her managers, so they are having difficulty appropriately allocating work to staff. Laura said that she has not received sufficient information from the finance department to complete the budgets. The finance department said they have sent her all the information they have available.

As the workers become distressed, the managers are becoming frustrated. They feel like they are unable to advocate for their employees or solve problems without key information like the departmental budget.

Discussion Questions

1. ***How can Laura most effectively use both management and leadership skills in her role as associate director? What combination of the two do you think would work best in this setting?***
2. ***What steps could be taken to build staff confidence?***
3. ***What advice would you give Laura on improving her leadership skills and to the managers on improving their***

management skills?

4. ***Which leadership style do you think a leader would need to be effective in this situation?***

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3.4 Power and Leadership

Using power correctly to influence the best out of all individuals and reach the top. Image by Joshua Earle "man sitting on gray rock while staring at white clouds" From: https://unsplash.com/photos/Dwheufds6kQ

As mentioned previously at the beginning of the chapter, and in chapter one, the main ability that leaders have is the ability to influence. Regardless if the leader is autocratic or alaissez-faire, he or she must possess the ability to influence subordinates to follow the vision, mission, and values of the company. **Influence** is the ability to have an effect on a person or situation. Within an organizational structure, the ability to influence is to have an effect on an individual, group, organization, or social level. Within institutions, the amount of influence that leaders have or processes usually depends on the power they wield within the firm.

Discussing power within an operation may seem like a malicious idea, especially with one person having all of the power. This could be detrimental,. However, in the context of an organization, the ability to have power can be beneficial for the leader and the subordinates. **Power** within an organizational context is the ability to influence someone to get something done that needs to be done. According to Pfeffer, power plays a major role in a person's career success, salary level, and job performance[9]. Researchers have defined five primary sources of power within organizations[10]:

- Expert Power
- Referent Power
- Legitimate Power
- Reward Power
- Coercive Power

The most effective influence, and most ethically grounded power is **expert power.** It relies on the leader's ability to have extensive knowledge in one or more areas within the learning organization. An example of this would be a professor who also has a wealth of experience within administration or in multiple faculties (i.e. earth sciences, and communication). This lends a level of expertise to take control of problems in multiple areas and find solutions to these problems. Commonly, with expert power is **referent power,** which is the ability for a leader to have influence through charisma and admiration from peers. That same professor who found solutions to problems and created positive changes would be regarded with reverence within a faculty.

Expert and referent power tend to operate on the emotional level, applying the concepts of 'leading by example'. If this does not seem to have an effect and common ground cannot be reached, using legitimate power may be a solution. **Legitimate power** are the leaders who uses their positions in an organization to influence decisions. Ideally, this is not desired, but someone might have to say 'I'm the CEO and this decision is final,' especially when faced with a tough decision where no common ground can be reached.

Reward and coercive power come closer to the bottom of the spectrum, as it moves away from an emotional level, and uses physical things to influence others. **Reward power** is a leader's ability to influence rewards within an organization (i.e. pay raises, benefits, and promotions). Reward power can create both positive and negative effects within a company. For example, a promotion to offer a pay raise to the individual who can sell the most widgets may lead to increased productivity to get the raise, but cut corners in the world of morality and ethics. If reward power is going to be used, it must be used within the confines of an organization's code of ethics. **Coercive power,** or the ability to lead a team through threatening of negative outcomes[10] is the least ethically-grounded influence. This would be a last resort if there was a subordinate who was completely unqualified and morally unjust in her or his own right. Coercive power to radically change the individual, and if change doesn't happen, dire consequences would be implemented.

Regardless of the power structure, it must fall within the organizational context it is presented in. Within a learning organization, the main goal is to facilitate learning and provide a space where analysis and critical thinking can be expanded upon. It appears that expert and referent power within a learning organization are the most beneficial in terms of using control to foster learning to students, as an example. The students see the expert and referent authority, but they also have the ability to be critical on certain concepts (especially in the humanities).

Review Questions:

1. What are the five types of organizational power?
2. What type of organizational power do you feel are important to effectively lead an organization?

Conclusion

In this chapter, an in-depth meaning of leadership and a full understanding of management and leadership in the context of a learning organization was developed. Use these concepts to draw connections to the other concepts present in future chapters.

A review of this chapter's major conclusions, include:

1. Autocratic, participative, free-reign (laissez-faire), and democratic leadership was explained. Identified how autocratic and free-reign essentially lie on opposite sides of the leadership spectrum.
2. Through the actions of planning, goal making, and creating timelines, certain leadership traits of transactional, transformational, visionary and charismatic leadership came to the forefront.
3. The behavioural leadership studies done by Ohio State University and the University of Michigan showed how both studies reflected the idea of encompassing all traits.
4. Power can be used in many ways (i.e. knowledge, status, gifts, force etc.). It depends on the organizational context and the goals of facilitative learning and critical thinking in learning institutions.

This chapter concludes the beginning section of outlining the basic concepts relevant to leadership and management within a learning organization. The next chapter will incorporate the organizational structure and connect the world of entrepreneurship to the concept of learning and education.

Unit 1 Reflection

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PART IV

CHAPTER 4: ENTREPRENEURSHIP AND SMALL BUSINESS MANAGEMENT

Kevin Rempel *is a Canadian sledge hockey player and Olympic medalist. Off the ice he is known for his successful venture "The Sledge Hockey Experience" which gives all individuals, regardless of ability, experience in the sport of sledge hockey.*

Those who have the drive to start their own businesses have the key word when it comes to entrepreneurship: drive! Entrepreneurs must be willing to take a great gamble, not only financially, but socially and psychologically as well. Although for some entrepreneurs, it seems like a difficult endeavour, while others see it as extremely rewarding. This chapter will unpack the world of entrepreneurship by discussing some risks and rewards to entrepreneurship and how to manage a small business. It will outline the similarities and differences between entrepreneurs and small business owners. Finally, social entrepreneurship and how it all fits within the world of a learning organization will be examined.

The learning outcomes for this chapter are:

1. Define entrepreneurship and the different types of entrepreneurs.
2. Decipher the risks and rewards of being an entrepreneur.
3. Define what a small business is, and its effectiveness in a marketplace.
4. Clearly define the similarities and differences between small business owners, and entrepreneurs.
5. Define the concept of social entrepreneurship, and how these concepts relate to the learning organization.

Chapter Tips:

- Relate the concepts of the learning organization to all facets of entrepreneurship.
- Focus on the understanding and meaning of the concepts of social entrepreneurship.

4.1 Entrepreneurship

The definition of an entrepreneur can be vague in many cases. The most succinct definition of an **entrepreneur** is someone with vision, drive, and creativity, who is committed to taking on risks to start a business for profit[1]. Entrepreneurs can not rest on their laurels, because, at the start, they have to be the brain, the heart, the soul, and the central nervous system of their business venture, diving into every aspect of their company, and being knowledgeable in every aspect of the operation. Below is a list of 12 questions entrepreneurs should ask themselves.[1]:

1. What is new and novel about your idea? Are you solving a problem or need?
2. Are there similar products/services out there? If so, what makes yours better?
3. Who is your target market? How many people would use your product or service?
4. Have you talked with potential customers to get their feedback? Would they buy your product?
5. What about production costs? How much do you think the market will pay?
6. How defensible is the concept? Is there good intellectual property?
7. Is this innovation strategic to my business?
8. Is the innovation easy to communicate?
9. How might this product evolve over time? Would it be possible to expand it into a product line?
10. Where would someone buy this product or service?
11. How will the product/service be marketed? What are the costs to sell and market it?
12. What are the challenges involved in developing this

product or service?

One question about entrepreneurship is, how is small-business success integral to learning organizations?

Within entrepreneurship, there are three specific types of entrepreneurs:

- Classic
- Multipreneurs
- Intrapreneurs

The inherent drive to start a business based on an original idea (invention or innovation) is the definition of a **classic entrepreneur**. This can be broken down into subsections of *micropreneurs* and *macroprensuers* or *growth-orientated entrepreneurs*[1]. Each one has different traits associated with their eventual goals, but the fact that they started a business based on an original idea remains.

Micropreneurs	Macropreneurs
• Based off of an original idea. • Start small and plan to stay small. • Business based on personal satisfaction and lifestyle.	• Based off of an original idea. • Start small and grow to a major corporation. • Based on personal satisfaction, and pursuing profit.

Tech Entrepreneur and 2020 U.S. presidential candidate, ***Andrew Yang,*** *discusses urban entrepreneurship at a conference in Detroit, Michigan. Image by: Asa Mathat for Techonomy, This work is free and may be used by anyone for any purpose. If you wish to use this content, you do not need to request permission as long as you follow any licensing requirements mentioned on this page. https://commons.wikimedia.org/wiki/File:Andrew_Yang_talking_about_urban_entrepreneurship_at_Techonomy_Conference_2015_in_Detroit,_MI.jpg*

The **multipreneur** is someone who starts a series of companies[1]. The goal of a multipreneur is to incorporate a host of businesses and sell them to other larger companies. One example would be an entrepreneur who creates many apps to sell to companies such as Apple or Google. Multipreneurs are always looking for fresh, innovative ways to build their companies.

The intrapreneur applies the same drive, vision, passion, and creativity into projects; they just do not have their own company. **Intrapreneurs** enjoy the freedom to develop new products and ideas, under the salary guidance of their employer[1], most commonly a large corporation. Although being paid by a higher entity, intrapreneurs have a host of freedom to work within their constraints, but take less personal risks on the financial end[1].

Entrepreneurship and Learning Organizations

The concept of entrepreneurship is having vision, drive, and creativity. Similar concepts are found in leaders who are in learning organizations to foster learning, and develop these traits in their subordinates (example: teachers and students). Therefore, leaders within a college setting who start their own initiative through drive, passion, creativity and risk would be considered entrepreneurs in many aspects. The main take-away is that the characteristics that are present in entrepreneurs are also common within the framework of leaders and managers in learning organizations.

Entrepreneurs	Leaders and Managers in Learning Organizations
• **Creativity**: In order to compete, entrepreneurs must be creative in developing an original product. • **Risk Taking**: mostly incurring financial risk when starting their company. • **Self-Motivated**: individually ambitious to see their company as successful	• **Creativity**: must be creative to foster a rich learning experience. • **Risk Taking**: Incurring risk of a project or procedure to ensure success for members within the learning organization. • **Self-Motivated**: ambitious to see their subordinates successful in their endeavours.

Figure 1: Similarities Between Entrepreneurs and Leaders and Managers within Learning Organizations.

Ultimately, successful entrepreneurs are the ones who are working when the rest of the employees are at home. They are the ones who open the shop in the morning and close the shop at night. In many ways, the individual entrepreneur is the company[1]; you see the individual characteristics, motivation and passion within the company and culture.

Review Questions:

1. What is the an entrepreneur?
2. What is the significant difference between micropreneurs and macropreneurs?
3. What are some similarities and differences between the idea of entrepreneurship in the corporate world and the learning organization?

4.2 The Risks and Rewards of Entrepreneurship

Entrepreneurs take on risk and manages it for success. Many times we hear of the successful entrepreneur, especially within mainstream media, however we rarely hear of the entrepreneur who crashes and burns[2]. This fosters a cloudy view on what entrepreneurship really is and what is needed to be successful.

To give some context, business expert Patrick Henry states, "75% of entrepreneurship venture-backed startups fail… the failure rate of all U.S. companies after five years is over 50%, and over 70% after ten years"[2]. This demonstrates how challenging it is to start a business, especially for entrepreneurs who place everything they have in their their ventures. So, why do upstarts take on such a challenge in the first place, aside from drive, motivation, and creativity? It is because these people are interesting and have a deep story behind why they got started. These are the same things that get investors excited on the basis of innovation, creativity, and a new way to help people within society. The old adage of 'high-risk, high-reward' perfectly encompasses the life of an entrepreneur, because financially there is a risk, but does the financial risk outweigh the emotional and innovative rewards the venture can produce?

There is much talk on how risk and reward are exemplified within start-up organizations. As an entrepreneur, it is important to be reflective when looking at the company, and the people who work with you. Certainly, drive could be forceful because of the massive success that is desired, but the humble actor may be a more useful tool. This relates to the concept of **entrepreneurial culture**, which is a mixture of personality and management identified by those who create not only the business, but the culture that surrounds it[2]. Even if the company becomes successful, it is important for the organization to grow, change its structure, but keep the same moral and ethical framework it started with. This can help with retention of key employees.

Within modern learning organizations, there is an entrepreneurship culture of creativity and innovation that helps people within society in the form of information and communication technology. **Information and communication technology (ICT)** is a new tool being used in many educational circles through the use of technology (i.e. computers and Internet) to develop a sense of deep learning for students. Educators who embrace the ICT model want to enhance learning ability, creativity, and innovation of their students by supporting different sensory goals through multi-media visualizations and technological representations[3].

Embracing the culture of entrepreneurship within the learning organization is beneficial not only for the success of the leader or manager, but also for the success of students and other members.. Moving forward, the prediction that the entrepreneurial culture being used in more and more modern learning organizations seems like a clear trend.

Review Questions:

1. According to Patrick Henry, what is the rate of failure for venture-backed startups after 5 years, 10 years?
2. What is entrepreneurial culture?
3. how would embracing a entrepreneurial culture be beneficial for leaders in a learning organization?

4.3 Small Business and Entrepreneurship: Similarities and Differences

What characteristics does a small business have? Are they physical, such as a garage, or a table with lemonade? Perhaps it is small in economic terms, with simple book-keeping, such as selling hummels online for $5 apiece. Perhaps small is two people staying up all night with tools and wiring trying to build a machine the world will eventually not be able to live without. Regardless of how you small businesses are viewed, they carry many different characteristics.

Small businesses represent a large portion of Canadian economic output and are defined by many physical, economic, social, and geographic characteristics. Physical is the physical space (a small office building), economic is the annual revenue (see Figure 2)[4] *[5], social is the employee makeup (1-99 employees in Canada is considered a small business)[6], and geographical is location (commonly located in small towns and small markets).

According to Statistics Canada Key Small Business Statistics – January 2019	
Number of Small Businesses (2017)	1,152,769
Contribution to GDP (2017)	38.4%
Real Gross Domestic Product (2017)*	1.86 Trillion
Equation: 1,860,000,000,000 x .384 = $714,240,000,000 $714,240,000,000 / 1,152,769 = $619,586 ***Therefore: The average economic revenue of a small business in Canada is $620,000 rounded annually.***	

Figure 2: Key Small Business Statistics, January 2019. *(Source: Innovation, Science, and Economic Development Canada: Small Business Branch, Government of Canada.)*

One factor that is present in a variety of small businesses today is their willingness to look globally[7]. Although their geographic location keeps them grounded physically, their outlook and their business model lends itself to a world-wide approach. This relates to the learning organization in ways that leaders and managers will look for big change outside of the walls and beyond geographical limitations. Similarly to how many small companies will export their entrepreneurial products to other areas of the world, leaders in learning organizations will use the entrepreneurial attitude to export holistic knowledge internationally.

This leads to the similarities and differences between a small business owner and an entrepreneur. Along with the classical characteristics of each, this contrast will develop an understanding of its relevance inside a learning organization. To better understand these similarities and differences, see the Venn diagram in Figure 3.

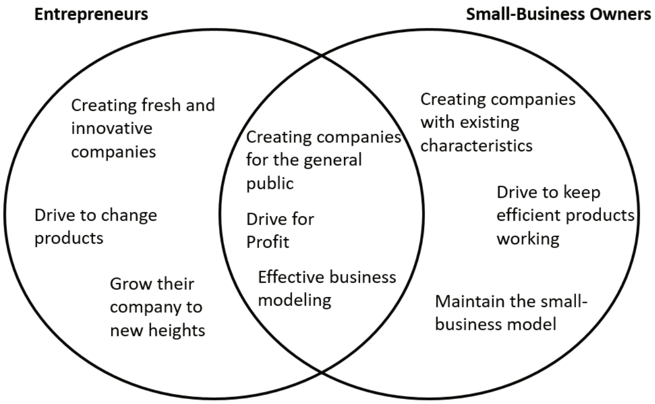

Figure 3: Differences and Similarities between Entrepreneurs and Small-Business Owners

The best way to look at this is to use the comparison of a book store owner and Jeff Bezos[8]. The book store owner buys and sells books for a profit, and maintains an effective model of selling physical books; whereas Bezos created a new model called web-based book-selling[8] which is an effective, fresh, and innovative way to sell books.

How this relates to the learning organization is the fact that there is a variety of different ways to lead individuals in fostering knowledge. An entrepreneurial approach would create a fresh and innovative way to change epistemological reasoning, and grow the knowledge of individuals. On the other hand, an existing epistemological concept could be used to maintain a knowledge base, which is a theoretical concept much like a small-business owner. Regardless of the design, it is important to keep a set of inherent values in keeping with the middle slice of the Venn diagram in Figure 3. The values must balance the two worlds effectively:

- Creating companies for the general public = Using wholesome knowledge for the learners
- Drive for profit = Drive for developing deep and critical thinking
- Effective business modeling = Effective learning theories to develop learners.

Learning organizations can utilize the ideas from small businesses and entrepreneurs to develop an ethical framework that would serve as a personal guide to amplify epistemological knowledge.

Review Questions:

1. What are some relationships between entrepreneurs and small business owners?
2. What are some similarities between entrepreneurial values and values within the learning organization?

4.4 Social Entrepreneurship

***The Deshpande Center for Social Entrepreneurship** located in Karnataka, India builds solutions to help people develop strategies for an entrepreneurial profile, while practicing sustainability. This file is licensed under the Creative Commons Attribution-Share Alike 4.0 International license. https://commons.wikimedia.org/wiki/File:Deshpande_Center_for_Social_Entrepreneurship.jpg*

Overall, the different trends of entrepreneurship are changing in the twenty-first century. There are two significant ones happening globally that relate to the concept of social entrepreneurship. **Social entrepreneurship** is defined by J. Gregory Dees as "adopting a mission to create and sustain social value (not just private value) [and] recognizing and relentlessly pursuing new opportunities to serve that mission"[9]. Using this definition, some global trends that impact the concept of social entrepreneurship can be examined.

Market Expansion

The expansive growth in markets develops the need for increasing the areas of world trade and scaling beyond backyards[10]. Social entrepreneurship must maintain a level of social value when dealing on a global scale. This relates not only to company standards and products, but also to relationships with people.

Resource Acquisition

With growth in the marketplace comes the need for resources. These resources can be labour, materials, technology, or capital[10]. Social entrepreneurship develops a sense of served accountability for constituencies[11] as described by Dees. Members must be resource aware, practicing the old economic model of scarcity to understand that resources can be finite, and managing them is important not just for the socially entrepreneurial company, but also for the socially conscious public.

Relating Social Entrepreneurship to the Learning Organization

The key point of social entrepreneurship in relation to the learning organization is to understand the need for moral and ethics within them to maintain a socially conscious business model. The teaching of knowledge should benefit the learner within n educational institution, as it makes way for a better society, and that learning must be done for good, not for malicious intent. Ideally, inside a school, it is important to use the same entrepreneurial spirit that strives for success. Using that drive, vision, and creativity will develop a thoughtful and effective learning experience for learners.

<u>Activity: Case Study</u>

- In this activity you will read the case study and provide some topics for discussion.
- You can use the text box at the bottom of the page to input a discussion to present.
- If available, engaging in a collaborative model will work

well to develop well-rounded answers.

This case study is from the Yale School of Management, Case Study# 11-013, link: https://vol10.cases.som.yale.edu/teach-all/introduction/teach-all-designing-global-network

Teach for All: Designing a Global Network

By its November 2011 annual conference in Mumbai, Teach For All's network consisted of 23 national partner organizations. Network members came from all over the globe, representing an eclectic group of countries. From Estonia, with a population of 1.3 million and near universal literacy, to India, with more than 900 times more people than Estonia and only 75% literacy, the one thing that united the diverse network was a commitment to building an organization similar to Teach For America in their respective countries.

Teach For America was the brainchild of Wendy Kopp. In her senior thesis at Princeton in 1989, Kopp outlined a plan to attack educational inequality in the United States by recruiting top college graduates to teach for two years in underperforming schools. While the initiative had a low retention rate among teachers, Kopp argued that program alumni would become engaged advocates for educational improvement.

Kopp's plan succeeded beyond her expectations. Within a decade, the Teach For America corps had become one of the most sought-after employers for bright college graduates from the nation's top universities. In just two decades of operation, Teach For America had placed more 30,000 teachers in underperforming schools around the country, and had built an alumni group that influenced the nation's educational policy. The concept also proved to work outside the United States. In 2002, Brett Wigdortz, a former McKinsey consultant, founded Teach First in the United Kingdom. Teach First had strong support from British government, and by 2011, the organization had placed more than 2,500 teachers in schools across England.

Kopp and Wigdortz believed a global group could be founded to help others interested in the model. With the success of their respective organizations, the duo became magnets for social entrepreneurs from around the globe who wanted to import the model to their own countries. They also imagined that a global organization which enabled everyone to learn from each other could be of value to each participant.

After securing funding to build a global network, Kopp and Wigdortz announced the formation of Teach For All at the Clinton Global Summit in 2007. Teach For All was to be a coordinating organization, giving each national organization the autonomy over its own affairs. As these participating national organizations (other than Teach For America and Teach First) were just beginning, Teach For All was a start-up supporting other start-ups on a global scale. It was an unprecedented situation, and one of the key tasks for leadership was delineating a strategic framework that would guide the central organization and its partners. As such, leadership defined the organization's "theory of the problem" and "theory of change" and then – over many months and with considerable consultation – refined a set of unifying principles and core values.

Operationally, leadership also wrestled with creating an identity for the network and an organizational structure to engage its partners. Teach For All committed to providing on-the-ground support to the newly formed national organizations for two years. As a result, the organization created the Partner Engagement Director (PED) position and hired employees to dispatch to the nascent partner organizations. For the inexperienced social entrepreneurs running these organizations, the PEDs provided valuable counsel for avoiding and solving problems that could have derailed their organizations' early efforts. And after two years of this on-the-ground approach, Teach For All's support would evolve to offer other avenues of guidance for its partners.

Since its founding, Teach For All has gained valuable experience and built a solid team. But as the partners and the staff gathered in Mumbai in 2011, there was much reflection on where the organization would go next. The experience in the field had demonstrated the attractiveness of the underlying strategic framework. However, the legal, cultural, and economic variation among participating countries meant the educational terrain would look different for each partner, often resulting in local adaptations of the framework. But how much adaption was too much? How should these local idiosyncrasies influence the selection of national partners? How should PEDs deal with the issues of alignment between partners and the strategic framework? And how should organizations measure impact?

The staff and the partner organizations also had to consider the future. Once national organizations were established, how would their needs change? How would Teach For All adapt to meet the demands of a maturing and growing network? Could Teach For All establish centralized services to provide to partner organizations? Should Teach For All charge its partners for these services? Would network partners be able to overcome time constraints in order to contribute to the collective knowledge sharing that helped accelerate partner impact across the network?

An interactive or media element has been excluded from this version of the text. You can view it online here: https://ecampusontario.pressbooks.pub/educationleadershipmanagement/?p=320

Conclusion

In this chapter, the general understanding of entrepreneurship, small-businesses, global impacts, and how they all relate to the learning organization was discussed.

A review of this chapter's major conclusions, include:

1. Entrepreneurship is the drive, vision, and creative aspects to start a business for profit. Three types of entrepreneurs are classic, multipreneurs, and intrapreneurs.
2. The main concept is that the risks lead to the rewards within entrepreneurial ventures. Keeping an entrepreneurial culture helps with the overall rewards of a venture.
3. Small business have many characteristics economically, physically and socially. In addition they create an effective impact on a country's marketplace.
4. Entrepreneurs create and drive; small-business owners inherit and maintain.
5. Understanding the entrepreneurial spirit in a social marketplace develops a leader in a learning organization to create innovative ways of teaching within a strong ethical framework.

The next chapter will continue with this theme of ethics and morality and to discuss the effects of ethics within a learning organization, especially in the form of Corporate Social Responsibility (CSR).

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PART V

CHAPTER 5: ETHICS, SOCIAL RESPONSIBILITY, AND SUSTAINABILITY

***Jeffrey Skilling** was the CEO of Enron during the early 2000's scandal which led to the company's bankruptcy and his arrest. Skilling is an example of unethical business practices.*

In this chapter, the meaning of ethics and morality in the framework of organizations will be discussed. Many similarities will be found from other business ethics' classes, or normative ethics' classes offered at a college or university. However, this text will delve deeper to understand the need for ethics within a learning organization. Furthermore, the concept of corporate social responsibility (CSR), how CSR fits in a modern landscape, and the need for sustainability in organizations will be examined.

The learning outcomes for this chapter are:

1. Describe and contextualize the definition of ethics, normative ethics, and understand classical ethical concepts.
2. Define business ethics, ethical leadership, and how these fit within learning organizations.
3. Define Corporate Social Responsibility (CSR) and how a modern view of CSR is relevant in today's learning organizations.
4. Define how global organizations develop and maintain sustainable initiatives.

Chapter Tip:

- What are some ethical questions that are raised in this chapter?
- How do you relate your personal experience to the ethical discussions in the chapter?

Keep in mind ethics and its relationship to a global outlook.

5.1 What is Ethics?

The word "ethics," or when someone is described as "ethical" follows the idea of doing what is good or right. **Ethics** is the code of moral principles that set standards of good or bad, right or wrong, in a person's conduct[1]. In addition, ethics and morality help people make the right decisions in a variety of different, sometimes difficult, circumstances. The idea of moral principles connecting what is right and what is wrong reflects how an individual *should* act. The field of ethics, in relation to how one *ought* and *should* act, is called **normative ethics**[2]. Normative ethics, in many ways, relates to objectivity. For example, normative ethics teaches the objective truth that human beings have absolute natural rights (i.e. to exist), along with freedom and autonomy.

With this information, the study of ethics may not be as black and white as it seems. Ethics is very much a grey area given the amount of ethical concepts that are available. For the benefit of the understanding ethics within a learning organization, there are four ethical concepts that find their place within organizations. The concepts are: justice, utilitarianism, deontology, and human rights.

Justice

Ethical **justice** relates to what is fair according to the prevailing standards in society[3]. For example, in a just society, using just standards a business deal of $1000 for incomplete work would stipulate a $1000 refund. Something unjust would be having to pay more money, or that the person who initially took $1000 for the job would now spend the rest of her or his life in prison. Essentially, justice finds the middle ground, moving away from the extremes of what is right and wrong in society.

Utilitarianism

Similar to justice, utilitarianism has a strong hold in society's prevailing standards. **Utilitarianism** is the concept that people should act, and decisions should be made, to reflect the *greater good* for the *greatest number* of people[3]. This is where ethics can be cloudy, given that the greater good, in some cases can be completely objective. For example, a university with a highly-successful football program approves funding for a new multi-purpose field. With this, some funding is now taken away from academic departments.

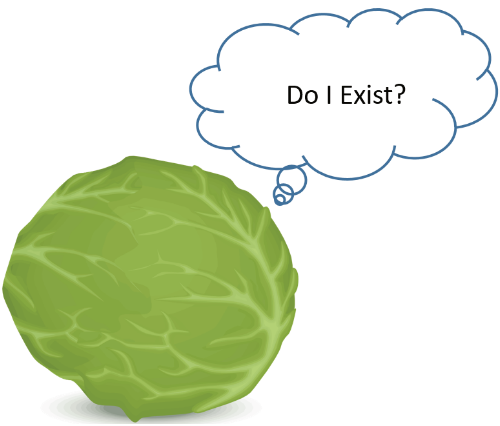
The pros for the greater number would be seen in the football team, other sports teams who benefit from the new field being built (i.e. soccer, track and field, and field hockey), students who go to the games, and the community outside of the learning organization who watch the sports. In addition, some academic departments would also benefit (faculty of human kinetics, and to an extent, faculty of business) but most academic departments would be upset that money is going to a new field that does not offer them any advantages. The departments who do not profit would say that this is unjust. A utilitarian would counter that while it might not fit the best interest of the academic departments, it is in the interest of the students who are both members of the academic departments and patrons of football games and other sports. Also, it helps the community, because the university is a public institution. Utilitarianism can be viewed as a pros-and-cons checklist to decide what is in the best interest for the greater good.

Deontology

As humans, we do not carry a list around of specific rules to make sure and that we are doing well. **Deontology** states that ethical individuals will meet their duties as it is obligated by society[3]. How do we keep this checklist in tact? For example, as a student your duty is to show up for class on time. However, on one specific day at the same time as your class, you have jury duty. On one hand, you have a duty to your professor, and your classmates to be in class on time. On the other hand, you have a duty to society to be a peer on a jury. This presents a dilemma in the check mark on our list should we decide it is more important. It can be argued being a good student, although not producing immediate benefits for society like jury duty, produces long-term benefits for society, in being a well-educated community member.

Human Rights

In society, humans have rights that surpass many external situations. The concept of **human rights** follows that the human race has rights to live, to freedom, and the pursuit of happiness[3]. Again, this can be a grey area considering that the human race is not the only race on the planet. Using another example, say all people feel a balanced diet of meat, vegetables, and water are paramount to their rights to live, be free, and pursue happiness. Of course, humans need to eat to survive, but what about animal rights? What about the laws of other living organisms? What about the effect of water loss for other living organisms or the environment? Day-to-day, we essentially do not think about these things as we are the main beneficiaries of the human rights' ethic. Essentially, that idea substantiates us, as we have the cognitive ability to think or not to think about ethics. A head of lettuce does not philosophically synthesize its place in the universe.



Ultimately, most ethical concepts produce a thesis and antithesis to their understandings. This brings the objective into the subjective, and produces an **ethical dilemma**. An ethical dilemma is a situation that requires an ethical choice for personal, organizational, or societal benefit. In this situation, after hearing the two sides, you may conclude that one side is more ethical, both sides are ethical, or neither side is ethical. The main idea is that the situation or dilemma is presented and worked through a thoughtful conclusion.

Review Questions:

1. What are the four ethical concepts presented?
2. What are the key aspects of utilitarianism?
3. What are some challenges presented when faced with an ethical dilemma?

5.2 What is Business Ethics?

After learning about normative ethics and the ideas about how we should and ought to live, business ethics are how we should and ought to conduct business fairly. More succinctly, **business ethics** is an applied ethics that focuses on real-world situations in the environment where transactions occur[4]. Without ethics in business, there would be no concept of organizational fairness. This leads to **ethical leadership,** which is the enacting of ethical values central to organizational alignment[4]. Being an ethical leader and the meaning of leadership are closely intertwined, given the ability to influence others. It usually depends on a level of morality and trustworthiness. Figure 1 shows the strategic organizational alignment of ethical leadership in relation to three main factors: vision, mission, and values[5].

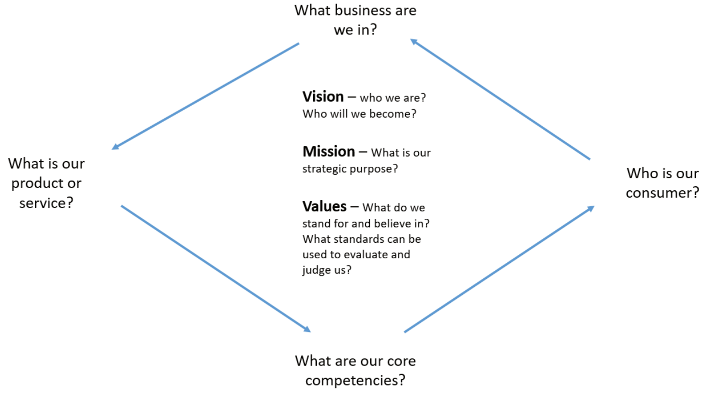
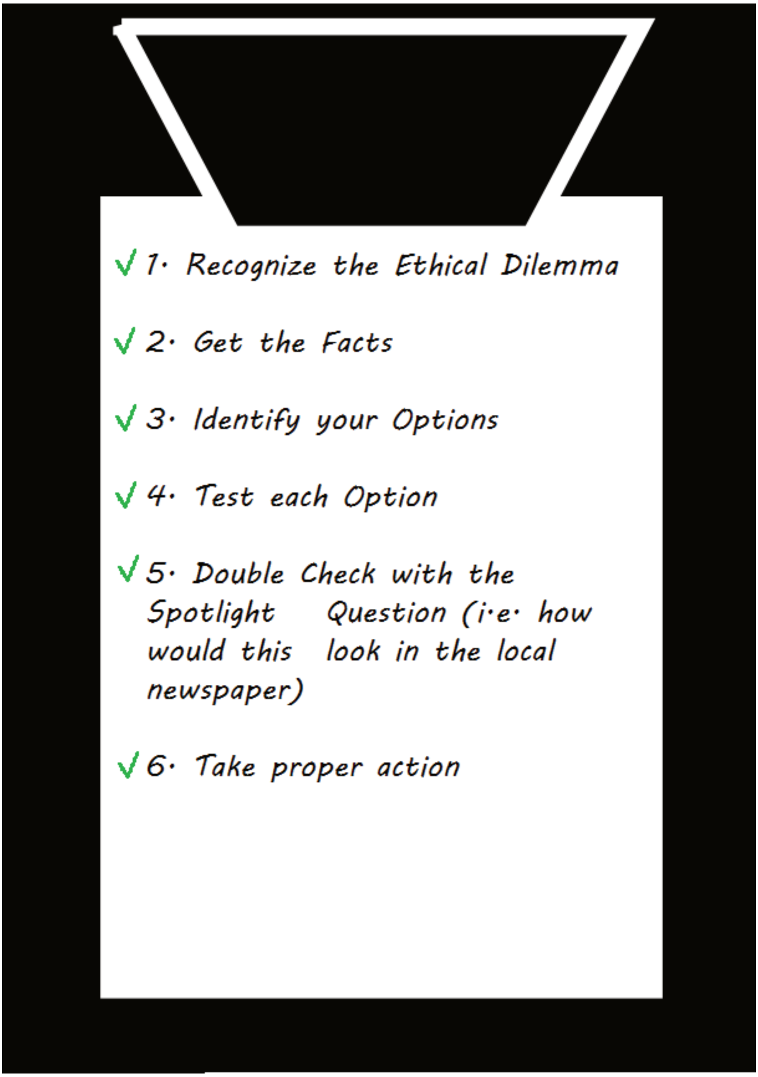


Figure 1: Strategic Organizational Alignment. *(Source: Joseph W. Weiss, 2014. In OpenStax, Principles of Management)*

One of the main questions within the world of business ethics is how to spot unethical activities. Once spotted, how are they effectively ratified and prevented from happening again? Researchers at Brigham Young University developed eleven categories in which business practices fail[6]:

1. Taking something that does not belong to you
2. Saying things that are not true
3. Giving or allowing false impressions
4. Buying influence or engaging in a conflict of interest
5. Hiding or divulging information
6. Taking unfair advantage
7. Committing improper personal behavior
8. Abusing power, or mistreating individuals
9. Permitting organizational abuse
10. Violating rules
11. Condoning unethical actions

Moving into a learning organization, these categories represent common ethical dilemmas. Five of these include: discrimination (*#8 abusing power, or mistreating individuals*), sexual harassment (*#8 abusing power, or mistreating individuals*), conflicts of interest (*#4 buying influence or engaging in conflict of interest*), customer confidence (*#5 Hiding or divulging information*), and organizational resources (*#1, #9, or #10 could fit in here*). It is important to be vigilant when dealing with these unethical problems in the workplace. A checklist of the ethical decision-making process to ensure the best result should be created[6].



With engaging in this checklist, it is important to be sure to understand the situation when making an ethical decision. It is important to be aware of the cultural, industry and ethical norms that are prevalent within the organization.

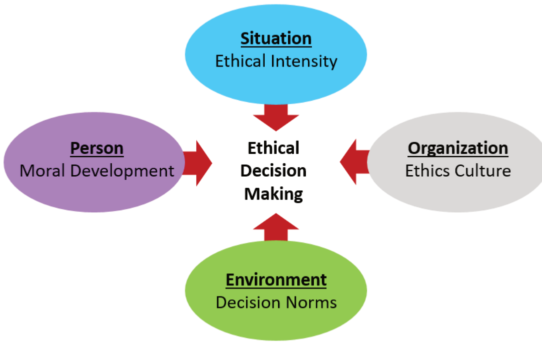
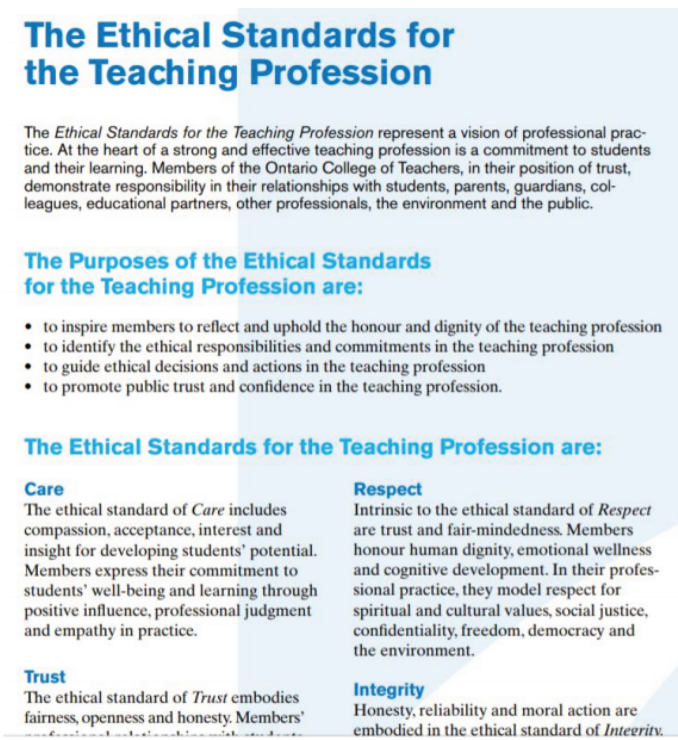


Figure 2: Ethical Considerations.

Understanding the ethical culture of an organization is key to ethical decision-making. One area where this is relevant is the role of a **whistle-blower**, an individual who exposes the misdeeds of others in an organization in order to preserve ethical standards and protect against further wasteful, harmful or illegal acts[7]. Whistle-blowers are regarded as great actors of ethics, given the risks that they take for their personal and professional well-being. Once a whistle-blower comes out against a company, there is some legal protection, but the protection is limited, and usually leads to the whistle-blowers being fired from their jobs. In many ways, becoming a whistle-blower is a personal ethical dilemma in of itself.

Moving forwards, what are some actions that can be undertaken to ensure ethical actions take place? Here are the many ways organizations can influence ethical conduct and proper business ethics[8]:

1. **Leading by Example** – Establishing proper patterns of behavior as a leader to pass onto your staff.
2. **Offer Ethics Training Programs** – According to a recent survey of the Ethics Research Center, more than 80% of American companies provide some form of ethics' training for employees[9].
3. **Establish a Formal Code of Ethics** – A piece of organizational legislature which provides employees with knowledge and of expectations, responsibilities, and behaviours toward fellow employees, customers, and suppliers. Listed below is a code of ethics for the teaching profession by the Ontario College of Teachers[10].



The Ethical Standards for the Teaching Profession

The *Ethical Standards for the Teaching Profession* represent a vision of professional practice. At the heart of a strong and effective teaching profession is a commitment to students and their learning. Members of the Ontario College of Teachers, in their position of trust, demonstrate responsibility in their relationships with students, parents, guardians, colleagues, educational partners, other professionals, the environment and the public.

The Purposes of the Ethical Standards for the Teaching Profession are:

- to inspire members to reflect and uphold the honour and dignity of the teaching profession
- to identify the ethical responsibilities and commitments in the teaching profession
- to guide ethical decisions and actions in the teaching profession
- to promote public trust and confidence in the teaching profession.

The Ethical Standards for the Teaching Profession are:

Care
The ethical standard of *Care* includes compassion, acceptance, interest and insight for developing students' potential. Members express their commitment to students' well-being and learning through positive influence, professional judgment and empathy in practice.

Trust
The ethical standard of *Trust* embodies fairness, openness and honesty. Members'

Respect
Intrinsic to the ethical standard of *Respect* are trust and fair-mindedness. Members honour human dignity, emotional wellness and cognitive development. In their professional practice, they model respect for spiritual and cultural values, social justice, confidentiality, freedom, democracy and the environment.

Integrity
Honesty, reliability and moral action are embodied in the ethical standard of *Integrity*.

Figure 3: The Ethical Standards for a Teaching Profession. *(Source: Ontario College of Teachers)*

4. **Making the Right Decision** – Refer back to the ethical checklist to ensure the proper procedures, follow up , and action is being taken.

Activity: Ethical Dilemma Case Study

- Read the case study.
- Complete the three questions below.
- Feel free to share with a fellow classmate or during an in-class discussion.

Source: *Classroom Exercise: Air Force Cheating Scandal Reflects Negatively on Organizational Culture*. Retrieved from https://danielsethics.mgt.unm.edu/pdf/air-force-classroom-exercise.docx

Air Force Case Study:

The first culprits people think of when they hear of cheating on a test are students. When the Air Force cheating scandal was brought to light, it would not be unreasonable to assume that it occurred in the Air Force Academy. However, the cheating scandal shocked many because it did not involve students or a school. Instead, the cheating occurred among a group of Air Force officers at Malmstrom Air Force base in Montana.

This scandal is one of several that have rocked the Air Force in recent years. In 2008 the chief of staff of the Air Force and a secretary were fired after failing to properly oversee a nuclear mission. In another incident, a general of the Intercontinental Ballistic Missiles force was terminated after an incident involving drinking. The cheating scandal itself has come to light because of an investigation into illegal drug use among 11 officers across six bases. Two of the officers under the drug investigation were implicated in the cheating scandal.

The cheating scandal involved a monthly exam to test the officers' proficiency in areas such as safety and launch protocol. It was estimated that the event took place in August or September in 2013 and involved a whopping 92 officers out of 190 crew members at the Montana air force base. This represents 20 percent of the work force, thought to be the largest scandal in Air Force history. An initial investigation revealed that one of the officers texted the answers to a proficiency exam to 16 others. Further investigation revealed that 17 other officers knew about the cheating but failed to report it. Altogether the scandal involved captains, lieutenants, and junior officers at the base.

The bad news continued to increase. Later investigations revealed that as many as 92 officers were involved in the scandal—nearly half of the crew members at the base. The officers were suspended and decertified. The Malmstrom Air Force base operates about one-third of the 450 Minuteman III nuclear-tipped intercontinental ballistic missiles. The Air Force maintains that the cheating scandal did not compromise nuclear safety, but the scandal is disturbing nonetheless. As a result of the suspensions and de-certifications, the rest of the officers had to take on extra duties for the time being.

There are signs that all is not well at some of the Air Force bases. While the tests themselves normally have a 97 percent passing rate, the Associated Press revealed that officers had anonymously intimated that they were tempted to cut corners on these tests. It is also notable that in the spring of 2013, 17 officers were de-certified due to bad performance and bad attitudes. In August, the Malmstrom Air Force base failed a nuclear safety and security inspection but passed in October. Air force officers may have felt pressured to cheat so as to earn high marks.

Ethical conduct in businesses involves individual values, organizational factors, and opportunity. It is important for organizations to have controls in place to limit the opportunity for unethical conduct. It would appear the Air Force did not have the necessary controls to prevent such a widespread cheating scandal. Additional pressure to succeed at the tests and threats of punishment likely created an organizational climate that encouraged cutting corners (as several officers had related to the Associated Press). In another AP revelation, a memo was discovered from a missile operations officer who complained that his force was infested with "rot." This does not reflect well on the organizational climate of the base. With both the opportunity and an organizational culture conducive to misconduct, it remained for the officers to individually determine whether to cut corners. Research has frequently indicated that organizational factors often overcome individual inhibitions when the stakes are high; thus, even if the 34 officers had strong values against cheating, they might have decided to engage in this behavior to avoid negative outcomes.

This leaves the major question of who should be held responsible. Did the Air Force base create a high-pressure culture? With something as serious as nuclear security involved, high standards must be enforced to ensure the officers are familiar with the issues they must know to do their jobs. However, the Air Force has admitted that its culture could be the problem, and that it might spend too much time looking at test scores rather than at the officer's overall ability. In a statement by the Air Force secretary, she admitted that in her travels to three air force bases, officers had intimated that they felt the need to achieve perfection to be promoted. In other words, they felt pressured to score 100 percent on tests. The breadth of the scandal and officer feedback reveals that the Air Force not only lacked the necessary controls to prevent the misconduct, but also might have a cultural problem that indirectly encouraged officers to do what it took to excel.

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5.3 Corporate Social Responsibility

In the modern age, a great deal of importance has been placed on making social changes within companies. **Corporate Social Responsibility (CSR)** is a form of self-regulation in which firms take action and make initiatives to help people and the environment[11]. There are two perspectives to corporate social responsibility which are defined as the **classical view,** in which Milton Friedman claims management's only responsibility is to maximize profits[12], and the **socio-economic view,** in which Samuelson claims management must be concerned with the broader social welfare and not just with corporate profits[13]. Regardless of the perspective on how CSR is achieved within an organization, CSR must compile a level of conviction, and a level of compliance in order to be successful in this area.

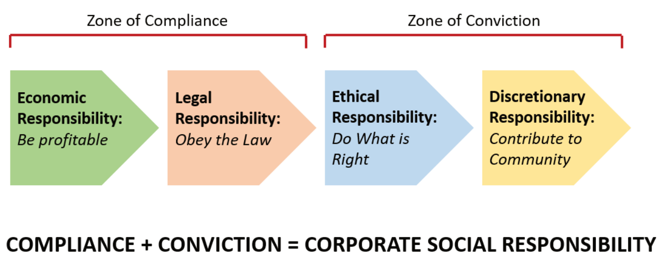

Figure 4: Evaluating Corporate Social Performance

The reality is that any form of management or leadership requires some form of social responsibility, responsibility to your colleagues, upper management, customers, and vendors. This relates to the idea of the many directions of corporate governance. **Corporate governance** is the different relationships that a manager will have within an organization. **Ethics self-governance** is the performance standards requiring high ethical standards and social responsibility.

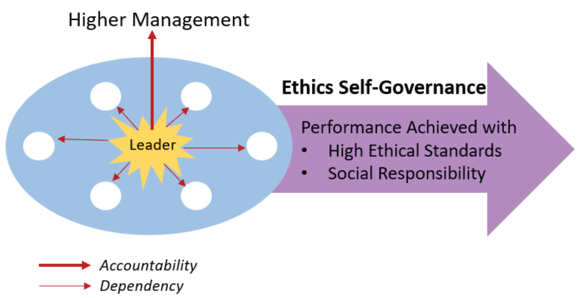

Figure 5: Directions in Corporate Governance

One of the most common methods for understanding CSR is to understand the **triple bottom line,** which relates to the *three p's: profit, people, and planet*[14]. The method of the triple bottom line is used to measure a level of accountability in funding to support ethical, social, and environmental causes. In addition, it is less of just implementing CSR for the sake of implementation; the triple bottom line acts as an empirical measure to ensure CSR initiatives make a difference.

Review Questions:

1. What are the steps of the zone of compliance and the zone of conviction?
2. What is the definition of Corporate Social Responsibility?
3. What are the three p's in the triple bottom line?

5.4 Modern Corporate Social Responsibility

In recent years many organizations have made an effort to be more socially and environmentally conscious. Image from https://provalisresearch.com/news-events/new-free-corporate-social-responsibility-dictionary-available-wordstat/

In 2003, the province of Ontario passed bill 198, which made sweeping and significant changes to how provincial companies report financial standing to provide the public with more corporate transparency[15]. This is one of the modern initiatives of engaging in CSR, and since 2003, it has grown. More in the area of environmental responsibility, companies today strive for a sustainable model within their organization. Areas where this is prevalent is in how organizations balance present and future needs, environmental protection, and economic development. There are five key reasons in why companies embrace a sustainable model:

1. Cost Reduction
2. Resource Preservation
3. Legislative Compliance
4. Reputation
5. Right Initiative

More will be discussed in Chapter five about the different levels of a sustainable model. The fact remains that organizations in the modern landscape tend to lean toward a sustainable model. There is a key trend that relates to the upholding of a sustainable model: the young, up-and-coming consumers feel social and environmental responsibility are important. A recent survey, conducted by Horizon Media, found that "81% of millennials expect companies to make a public commitment to good corporate citizenship"[16]. In addition, the 2015 Cone Communication survey found that 9 out of 10 millennials would switch brands to one associated with a cause[16]. Even with the recent defunding of many environmental programs (United States being a prime example) companies still follow a sustainable model within their organizations, ensuring that their triple bottom line is met.

Changes in philanthropic measures have also been a factor caused by a rise in CSR. It seems that philanthropy would, in itself, be a socially responsible measure. However, **strategic giving** ties the philanthropy and CSR to the company's mission, vision, values and targeted donations to local areas[17]. Strategic giving brings a global idea of philanthropy and brings it to a community level, meeting a host of social and economic needs with a "think globally, act locally" mentality.

There are challenges when looking at CSR within the context of the global environment. Many multinational corporations must balance challenges, such as respecting local practices and traditions, maintaining positive relationships with the host population, and conflicting interests of stakeholders in the area of human rights[17]. Whether it be a local company, or a large multinational conglomerate, it is best that the organizations exemplify a level of good conviction and good compliance in order to maintain good ethical status and relationships within a foreign country.

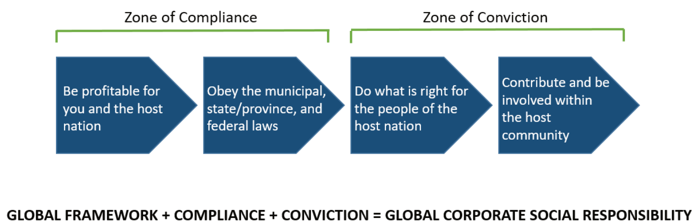

Figure 6: Corporate Social Performance on a Global Level

Although CSR is not a complete fix to organizational challenges, or the only factor, in making an organization successful, it is a good first step. Within learning organizations, CSR changes have found its place in the administrative conversation. At the University of Windsor, the Environmental Sustainability Advocacy (ESA) have the goals of making the university a more "ecologically responsible place to work, study, teach, and conduct research"[18]. In a new global marketplace, the CSR trend does not seem to be going away, given the impact it has on many young consumers within the marketplace. In relation to learning organizations, younger professors and administrators are entering the workforce and expanding on the concept of CSR, which will remain strong.

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5.5 Sustainability in Global Organizations

A deeper understanding of the sustainable model and how sustainability within a global marketplace is relevant and apparent to success will be described. First, here is a more succinct meaning of the five factors.

Cost Reduction	**Resource Preservation**	**Legislative Compliance**	**Re**
Finding more efficient and sustainable means of production.	Using alternative energy methods to produce products. (*Moving from oil and coal to wind and solar*).	Adhering to the laws and regulations of home and host countries. (*Following municipal, state/province, and federal laws with regard to environmental protection and human rights*).	M re ho co m da tr

As previously mentioned, an organization can find itself in a host of challenges when maintaining a sustainable model in the global marketplace. According to Daft, the greater complexity in the environment, the greater chance for ethical problems and misunderstandings[19]. Global organizations can find challenges in maintaining any one of the five areas and must be cognizant of this, especially within the areas of legislative compliance and reputation. Joseph W. Weiss outlines major management and ethical issues inside multi-national corporations in the forms of economic issues (*cost reduction*), political (*legislative/reputation*), technological (*reputation*), social and labour (*legislative, reputation, right initiative*), and ecological (*resource preservation*)[20]. Weiss also states that American companies are usually required to assist and add value to local countries. Here is a list of some of these practices[20]:

- Hiring local labour
- Creating new jobs
- Developing particular industry sectors
- Provide business and learning skills
- Helping decrease the countries debt and improve its balance of payments and standard of living.

The goal of these sustainable practices is to maintain a positive relationship with host countries, while in turn, remain relevant and competitive in the global marketplace. The ethical implications are seen here in how to maintain sustainability through the five factors. However, the motivation still remains unclear. An ethical understanding needs to be further explored on the psychological level in that there are companies truly willing to engage in sustainability to do good, or remain relevant in a global marketplace. Essentially, it is the argument of doing "good for goodness" sake, or doing good for the sake of competitive advantage. Regardless of the motivation, the fact that CSR exists and the discussion of ethical frameworks have been beneficial to the advancement of organizations from the industrial revolution to modern times.

This also applies to learning organizations and how ethics is found within them. The freedom to pursue learning, especially in a global environment, is paramount to the success of the learners and leaders within the school. Many educational have been practicing a sustainable model: a model of "think globally and act locally" where leaders use broad globalized concepts and bring them to a community level where their institution is held.

Review Questions:

1. What are the five factors of sustainability in a global marketplace?
2. What are five practices Joseph Weiss outlines that American companies should do when expanding their corporations in other countries?
3. How do the practices of global sustainability relate to the learning organization?

Conclusion

This chapter introduced the broad idea of ethics in relation to corporate and learning organizations. Its goal was to provide a general understanding of ethics and how it relates to the everyday procedures found within companies.

A review of this chapter's major conclusions, include:

1. Ethics is a code of moral principles that set the standards of right and wrong. Normative ethics is the basis of morality and how one ought and should act. There are four ethical concepts relevant in learning organizations: j*ustice, utilitarianism, deontology and human rights*.
2. Business ethics are how we ought to conduct business fairly using real-world situations. Ethical leadership is organizing morals in relation to organizational alignment.
3. Corporate Social Responsibility (CSR) is a self-regulatory measure which guides organizations to make initiatives to help people and the environment by using *compliance* along with *conviction*. Newer demographics in the workplace will continue to use and benefit from CSR
4. Global organizations can find challenges when working in a world-wide marketplace. Alleviating those challenges can be done by developing and enhancing the five factors of sustainability: c*ost reduction, resource prevention, legislative compliance, reputation, and right initiative*.

Regardless of personal ethical views on many topics, the need for ethics within learning organizations is vital to its success. A precedent of good ethical and moral behavior starting from the top of the business that trickles down throughout is the best approach. Furthermore, the growth of an institution can rely on how ethically moral it is, given its importance among new demographics in a global marketplace.

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PART VI

CHAPTER 6: LEARNING PRINCIPLES

To understand learning, the theories behind how learning develops must be understood.

Learning theories are often primarily geared to the education stream of K through 12. Although the theories in this chapter are relatable to these grade levels, a heavy emphasis will be placed on adult learning within post-secondary learning institutions. Furthermore, some key theories in organizational learning, and the nature of knowledge in relation to work within learning organizations will be deciphered.

The learning outcomes for this chapter are:

1. Identify and define the learning cycle for adult education.
2. Compare and contrast the differences between short term memory and long term memory, and relate it to higher education inside a learning organization.
3. Define epistemology and understand the base theory of learning.

4. Define the theories of organizational learning, and contextualize how they would fit in a learning organization.
5. Define the three c's of knowledge in relation to work within a learning organization.

Chapter Tips:

- Develop an understanding of epistemology and why it is important in a learning organization.
- Look in-depth into the theories of learning within organizations and their relationships to learning organizations.
- Familiarize yourself with constructivism and Bloom's Taxonomy.

6.1 The Learning Cycle

As previously mentioned the focus will be on adult learning within a learning organization. This concept is a rich experience, given tat a university can have a diverse range of adults taking classes at any time. Diversity is seen with age, gender, experience, and education level. Adults in university have a level of freedom to pursue their academics on their own terms, which leads to a host of different learning styles present in adults. Theoretically, adults engage in academic learning in a four step cycle[1]:

1. Prepare
2. Absorb
3. Capture
4. Review

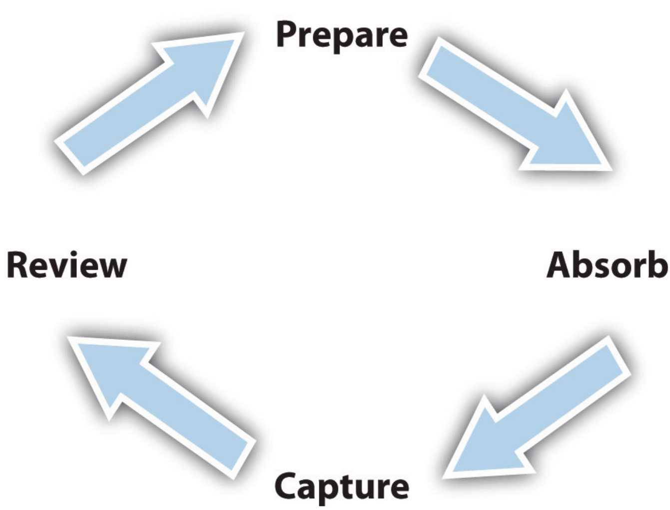


Figure 1: Four Step Cycle of Academic Learning. *(Source: College Success, University of Minnesota, 2015, CC BY-NC-SA)*

Prepare

The concept of preparation relates to the student's readiness. Within an institution or organization, **preparation** is the individual's readiness to pursue knowledge within a class, semester, or program. Stewart and Maisonville describe preparing as the ability to put yourself in the right mind-set to learn[1]; which places the emphasis on mental preparedness. Within learning organizations, preparedness also involves some knowledgeable aspects for success. Good leaders and good managers are often defined by their extent of expert knowledge within a field. Therefore, those who have the knowledge available will become better prepared for work.

Absorb

What comes to mind often is the simile of the sponge. When absorbing knowledge, the student is the sponge and the water is the knowledge getting absorbed. Keep in mind that the sponge has the ability not to only absorb water, but to absorb a host of liquids (coffee, soup etc.) as well. This relates to the notion that **absorption** for a student is the taking in of new and different ideas within a classroom or in the reading of a textbook[1]. Absorption in the case of a leader or manager within a learning organization can come from agents of accountability (i.e. upper managers) or agents of dependency (i.e. subordinates). The ability to accept new knowledge is a key factor to being a successful leader and manager within a learning organization.

Capture

When absorbing material, sometimes it does not stay in the sponge and leaks out. This is where **capturing** comes in, and relates to the re-interpretation of knowledge for better understanding and contextualization. For leaders and managers within learning organizations, consistent review and process is done on a daily basis. Past measurements, performance, and forecasts provide a map to the re-capturing of new data for better understanding in future endeavors.

Review

Going over all of the information from absorption to capturing is important to fully grasp a concept and to gain full understanding. Once this is done, the student should be able to identify, describe and contextualize a piece of knowledge. This is referred to as **reviewing**. Using the cycle, Stewart and Maisonville also use the review process as a way to prepare for new information and ideas[1]. This is also relevant for leaders and managers within learning organizations as review depends on capturing knowledge, and capturing new knowledge depends on reviewing. For example, organizational forecasting cannot be achieved without a review of the organization's past, and with no understanding of the past, a leader or manager would not be able to effectively forecast. Consistent revision is imperative to the success of a student or someone working in a learning organization.

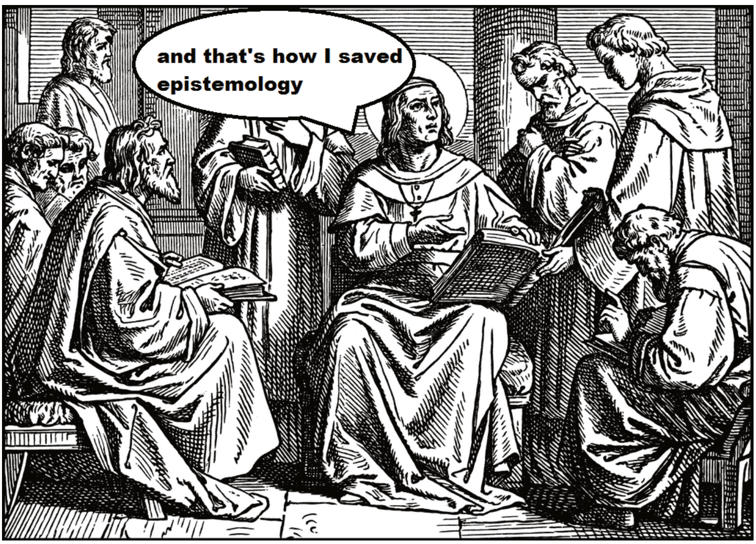
How Memory Works

The concept of learning is closely tied to memory and retention of relevant learning materials. Memory works in two ways: **short-term memory** and **long-term memory**. Memory in the short term is the active approach to memorization, and focuses on learning in the moment. Memory in the long term is the passive approach through a series of data links which are retained in our minds at all times[1]. Learning can vary by individual, but the concept of fostering deep learning and long-term retention is beneficial to a student, teacher, or administrator in a learning organization.

Review Questions:

1. What are the four steps to academic learning?
2. What is the difference between long-term and short-term memory?

6.2 Epistemology and Basic Methodology



The cartoon rendition of Augustus explaining epistemology to his learners may not be as easy as it seems. Image from Maximus Confesses, https://medium.com/the-liturgical-legion/augustinian-epistemology-d8ae3b25023c

The basis of learning is grounded in knowledge of a specific topic or idea. Because of different worldviews and experience, knowledge can be different from one individual to the next. Inside of a learning organization, one leader may have a different set of knowledge and skill set compared to the next leader. **Epistemology,** according to Hofer and Pintrich, "is a branch of philosophy concerned with the nature and justification of knowledge"[2]. This applied concept has to do with the idea of consensus. The justificationcomes from the consensus of ideas. One example would be the scientific consensus that the earth and the planets in the solar system follow the heliocentric model (revolve around our parent star: the Sun). However, with different worldviews and different life experiences, one might disprove that scientific model.

This introduces the idea of epistemology: one who has the knowledge of a scientifically proven epistemological method has the duty to teach one who might not follow a consensus about a topic. This is not to say one is more wrong than the other, rather, one must show the knowledge first hand with empiricism and rationality.

With the introduction of a scientific ideal, there is a scientific method to teaching. The **scientific method of teaching** is based on grounded theory, research, and conflicting theories of some research commonly driven by epistemological differences[2]. Along with the epistemological side, there is also a side that is grounded in the teacher's experiences. These experiences can shape the worldview of an individual, therefore they should not be the main measure in a good teacher. One could have great knowledge and no experience, where another could have a host of experience, but limited consensus knowledge.

Keep this in mind when thinking about how learning within organizations can be developed and cultivated through epistemology. The difference between individual needs and motivation will be looked at, along with the concepts of equity, expectancy, goal setting and self-efficacy. As an exercise, see how the ideas presented in organizational learning theories justify their base of knowledge, and contextualize what theories follow an epistemological model. Figure 2 shows how justification through knowledge can be reached with an issue based model.

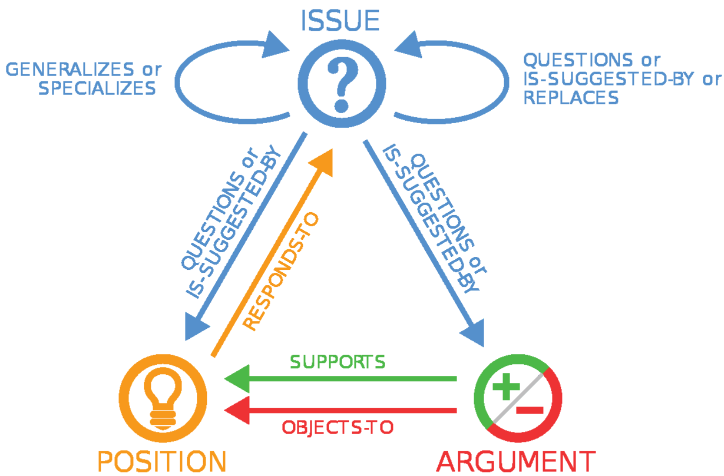


Figure 2: Issue-Based Information System: Rhetorical Rules Diagram with Three Nodes *(Source: Jeffrey E. Conklin; Michael L. Begeman. 1998. gIBIS: a hypertext tool for exploratory policy discussion. Creative Commons, CC0 1.0 Universal (CC0 1.0) Public Domain Dedication)*

Review Questions:

1. What is epistemology according to Hofer and Pintrich?
2. What is the scientific method of teaching?
3. What are the three steps of the Rhetorical Rules Diagram?

6.3 Theories of Learning within Organizations

When we think of learning within an educational organization, we tend to focus on three distinct needs of leaders: managers, subordinates and direct reports. As people are driven by an innate force to be actionable. The ability to use that force within an organization that accounts for the persistence to do work is referred to as **motivation needs**. The need to be active either physically or mentally, refers to the inherent abilities that are present. But what if the condition is not present or unfulfilled? The concept of deficient psychological or physiological needs in a person are referred to as **individual needs**. People, regardless of status, have different needs. Thus, theories that complement the motivation and individual needs of learning organization members can be developed. Maslow's Hierarchy of Needs, mentioned in Chapter Three, is a great tool for understanding these needs. The Maslow Hierarchy can be simplified by Alderfer's ERG theory. This theory builds on using and collapses Maslow's five needs into three distinct categories[3]:

1. **Existence Needs** – Psychological and material well-being.
2. **Relatedness Needs** – Desires for satisfying personal relationships.
3. **Growth Needs** – Continued psychological growth and development.

When Maslow is compared to Alderfer, the different needs required from Maslow can be placed in the ERG model.

Essentially, this outlines the main factors of individual motivation towards growth and development or regression and frustration[4].

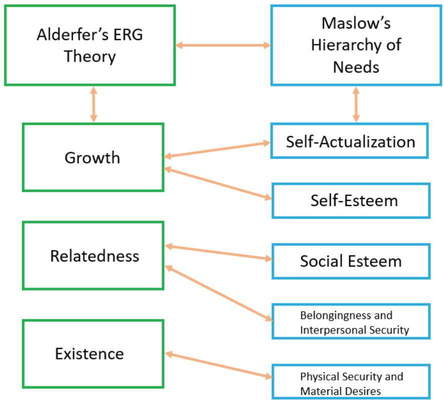


Figure 3: Comparing and Contrasting Alderfer and Maslow.

Along with the ERG theory, there are two other theories connected with the topic of organizational needs: Herzberg's **Two-Factor Theory** and McClelland's **Acquired Needs Theory**. In the two-factor theory, a binary model is used to exemplify job satisfaction[5]:

- **Satisfier Factors**: nature of the job that is satisfying.
- **Hygiene Factors**: work setting that is unsatisfying or "turned them off".

With this specific theory, the members of the organizations and the different actions that are implemented for employee satisfaction are considered. One example would be an individual who works in a great work space with wonderful people and a great interpersonal culture. However, that same organization might not align with someone environmentally or with regard to social responsibility. Most organizations do not align to one side when you take into account all of the factors. Instead, most use a utilitarian approach to find the greatest number of satisfier and hygiene factors as the best options. On the other hand, if one hygiene factor is unacceptable, such as an extremely toxic work environment, that might outweigh the satisfiers of pay, benefits, and job security. Looking at the two-factor theory critically the binary model can be broken down to understand the given experiences and the weighting of actions. The two-factor theory prioritizes importance.

The acquired-needs theory, developed by psychologist David McClelland, uses the experiential approach of needs through a Thematic Appreciation Test (TAT)[5]. The acquired-needs theory attempts to identify three needs:

- Need for **Achievement**
- Need for **Power**
- Need for **Affiliation**

This theory proposes an in-depth understanding of another two-factor contrast between the dominant motivators and the characteristics of the individual. McClelland found that there is a correlation between the psychological characteristics and their acquired needs to be successful[5].

Dominant Motivator	Achievement	Power	Affiliation
Characteristics of the Person	• Strong need to set and accomplish goals. • Takes calculated risks to accomplish their goals. • Likes to receive regular feedback on their progress and achievements. • Often likes to work alone.	• Strong need to control and influence others. • Likes to win arguments. • Enjoys competition and winning. • Enjoys status and recognition.	• Wants to belong to the group • Wants to be liked, and will often go along with whatever the rest of the group wants to do. • Favours collaboration over competition. • Doesn't like high risk or uncertainty.

Figure 4: Dominant Motivators and Characteristics Affecting Acquired Needs.

Motivation Theories

Motivation theories are organizational learning theories which rely on how people behave in order to motivate themselves to complete a task. There are four specific types of process theories of motivation:

1. Equity Theory
2. Expectancy Theory
3. Goal-Setting Theory
4. Self-Efficacy Theory

Equity Theory

Developed in the 1960's by J. Stacy Adams, the theory of equity in motivation is based on the logic of social comparisons: the notion that perceived inequality is a motivating state. People have different preferences to equity which is described as *equity sensitivity*[6]. This means that perceived equity or inequity is the key motivating factor for motivation. Essentially, if someone believes "why work hard because I will never reach this area?" can be an idea of a perceived inequity. However, the inequity, in some cases, may only be perceived, and there are options available to use goals to build an equitable reality. In other cases the inequality is too overwhelming to match. It depends on the experience and the tools available to the individual.

<u>Expectancy Theory</u>

Developed in 1964 by Victor Vroom, it proposes that motivation comes from three expectancy factors[7]:

1. **Expectancy** – belief that working hard will result in desired outcomes
2. **Instrumentality** – belief that successful performance (quantifiable) will be followed by desired outcomes.
3. **Valence** – the value placed on possible rewards and work-related outcomes.

The idea of expected outcomes, based on work, is at the heart of this theory. It uses, in many ways, a reward/punishment model (i.e. Work hard and be so you will receive reward.). The variable is the understanding of valence and its connection to expectancy and instrumentality. Someone might want to strive to work hard if a truly life-changing reward is waiting in the balance, but another may be hesitant if the valence of the reward does not align with the individual's context of expectancy or instrumentality.

Expectancy *x* Instrumentality *x* Valence = Motivation

<u>Goal-Setting Theory</u>

Developed by Edwin Locke in 1984, the goal setting theory encompasses both an idea of planning and execution. The idea of the theory is that goals can be motivating if they are properly set (planning) and well managed (execution) through four guidelines[8]:

1. Give direction
2. Clarify performance expectations
3. Provide a frame of reference for feedback
4. Set a foundation for behavioural self-management

The idea is if goals are well produced and followed-up, motivation of the individual in an organization are raised. This theory brings a deeper understanding to the concepts of scientific management in the area of planning, organizing, coordinating, and controlling.

Self-Efficacy Theory

Developed in 1977 by Albert Bandura, the self-efficacy theory is about being self-efficient. This means that the individual feels self-efficient or personally capable to perform a task. In addition, there are four areas in which self-efficacy can be enhanced[9]:

1. **Enactive Mastery** – confidence through positive experience
2. **Vicarious Modeling** – learning by observing others
3. **Verbal Persuasion**
4. **Emotional Arousal**

The idea of self-efficacy can be cultivated through learning in an educational institution. Educators look to instill a sense of mastery in their students, through many individual and collaborative exercises, to produce an emotional and holistic learning experience.

Bringing the Theories Together

Regardless of the organizational theory used, each one follows a stream of reinforcement. **Reinforcement strategies** are tools used by the manager to strengthen policies and procedures in subordinates within an organization. Reinforcement strategies were first studied by B.F. Skinner in 1948, when he coined the term "**Operant Conditioning**:"

> "*The process of applying the law of effect to control behaviour by manipulating its consequences*"[10]

There are four principles of reinforcement strategie,s and Figure 5 outlines a tree illustrating them from management to the individual, and how each enforcement principle is relayed.

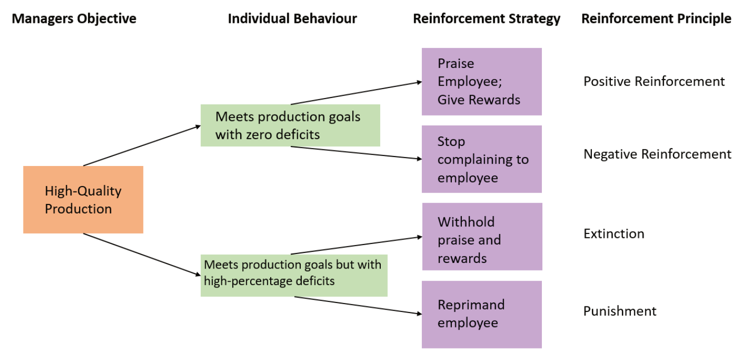


Figure 5: Using Reinforcement Strategies in Management. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition.)*

Review Questions:

1. What are the two types of needs individuals seek within organizations?
2. What are the three dominant motivators affecting acquired needs? What are their characteristics?
3. What are the four types of motivation theories?

6.4 The 3 C's

Understanding reinforcement can foster a proper learning atmosphere within learning organizations. The learning cycle, along with the theories of organizational learning all share one connection: behavioural knowledge. The interpretation of behavioural knowledge is outlined by the **3 C's**:

- Cognitivism
- Constructivism
- Connectivism

Cognitivism

The concept of **cognitivism** was founded upon the belief of identifying the mental process: internal and conscious representations of the world[11]. Cognitivist theory, within the learning organization, follows many similar ideas to the self-efficacy theory of enacting mastery. One of the most common learning theories within a cognitivist approach is Bloom's Taxonomy developed in 1956[12]. Bloom's taxonomy is a lesson in scaffolding that strives for mastery. In recent years, Anderson and Krathwohl have modified the original 1956 version to accommodate today's understanding of knowledge[13]:

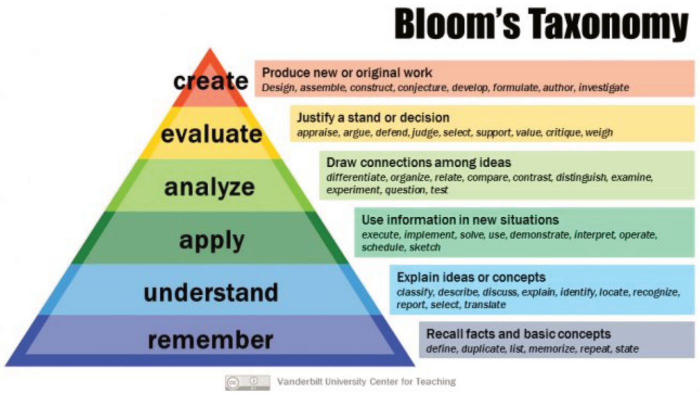


Figure 6: Blooms Taxonomy *(Source: Vanderbilt Center for Teaching. Licensed under the Creative Commons Attribution-Share Alike 4.0 International license.)*

Constructivism

While cognitivism is about identifying the mental process, constructivism is about identifying the experiential process. **Constructivism** is the belief that all knowledge is subjective in nature, constructed from reality, and mutually agreed upon in a consensus[14]. This pragmatic approach follows the idea that what is seen as a consensus is relatable to truth. performing taks that will produce quantifiable results show shades of expectancy theory. However, perceptions of truth differ. For example, two friends see a car pass by. One says the care was travelling 60/kmh, while the other says the car was going 50/kmh. Which statement is true? To quantify if the car was going 50/kmh or 60/kmh, it needs to be determined whether the car is present. The speed of the car is subjective, and up for debate, but the constructive fact is that the car was present.

The subjective nature is important to understand constructivism, and in-turn find ways to deconstruct subjectivity. One way educators use constructivist theory in learning organizations is to have students develop reflections on their experience[14]. The use of thoughtful reflection, either written or verbal, helps to better understand the concepts within a learning environment. Reflections find a connection within Bloom's Taxonomy model by moving up from understanding and remembering, to applying, analyzing, evaluating, and creating.

Connectivism

A newer form of understanding is through connections. **Connectivism**, according to Siemans, is knowledge that is created beyond the level of individuals and that knowledge, through a network of connections, is continuously changing[15]. The connected world relates to the idea of globalization as mentioned in Chapter Two. The modern world is interconnected, and whether you are a manager within an organization, or an educator within an institute of high learning, the concepts of connectivism will be needed to enhance the teaching and learning of students or employees.

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Conclusion

In this chapter, the learning cycle, how individuals learn, and the concepts of epistemology were discussed. This provided a frame of mind about how to think of the many organizational learning theories presented, such as the epistemology of needs theory and motivation. Also, how the bases of behavioural knowledge affect the organizational theories and their understanding within organizations was explored.

A review of this chapter's major conclusions, include:

1. The four step cycle of learning includes: prepare, absorb, capture, and review.
2. The differences between short-term and long-term memory is beneficial to use within a learning organization.
3. Epistemology is the nature and justification of knowledge, and the scientific method of teaching follows a base understanding of teaching and learning.
4. Understanding of the ERG theory, acquired needs, and motivation theories of equity, expectancy, goal-setting and self-efficacy show how people learn within learning organizations.
5. Cognitivism, constructivism, and connectivism theories help to explain behaviour in learning organizations.

Using these theories within management and leadership can prove beneficial in helping to understand other members within an organization, especially the direct reports and subordinates. With knowledge, or an epistemology of different theories of organizational learning, more self-aware and effective leader within an organization can be achieved.

Unit 2 Reflection

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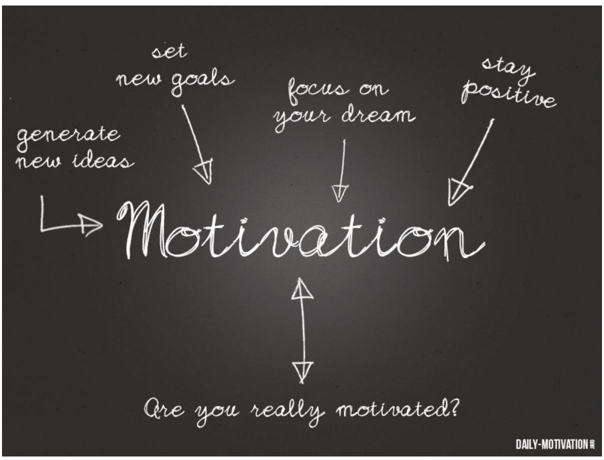
PART VII

CHAPTER 7: MOTIVATION AND JOB DESIGN



An individual must be motivated to carry out a task by setting realistic goals, and affirming the reasons for them

In this chapter, the concepts of motivation theory from chapter six will be applied to job design within learning organizations. When discussing job design, the focus is on how leadership and management techniques are used to enhance job enrichment within an organization. Another focus is on how to improve job characteristics within a modern learning organization.

The second part of the chapter will focus on the role of motivation within an external organizational environment, and the interdisciplinary role organizations play within economic, socio-cultural, and political environments. Then, how motivation can impact corporate culture within organizations, and how it can relate to learning organizations will conclude the discussion.

The learning outcomes for this chapter are:

1. Describe the need for motivation within the framework of job design.
2. Describe the characteristics of job design and what the steps are to improve job characteristics.
3. Contextualize the importance of external organizational environments and their effects on motivation within the learning organization.
4. Explain corporate culture, and how it is used within learning organizations.

Chapter Tips:

- Contextualize the meaning of reinforcement.
- Keep in mind societal impacts on motivation.
- How does one manage their her or his autonomy with motivation?

7.1 Job Design

When discussing job design, the focus is on the macro approach of how a leader, within an organization structure, assigns tasks for individuals. **Job design** follows the fundamentals of scope, depth, and specialization of the job. It relates to the job's simplification, rotation, enlargement, and enrichment. Motivation within job design uses the framework of a matrix which follows certain fundamentals.

	Job Simplification	Job Rotation and Enlargement	Job Enrichment
Job Scope: • Number and variety of tasks	Narrow	Wide	Wide
Job Depth: • Extent of planning, controlling, and responsibility	Low	Low	High
Task Specialization	High	Moderate	Low

Figure 1: Job Design and Motivation *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition.)*

What this matrix shows is that individuals within organizations who are challenged, with low change and low turnover, find more enrichment in their job. A learning organization, such as a university, is obligated to foster learning. This involves a massive amount of planning, and should include members from services, staff, faculty, and administration. This challenge is what provides the motivation to complete tasks with generally low turnover within the university system. It provides more time for leaders to complete those challenging tasks, leading to a rewarding and enriched job.

This relates to the ideas presented in chapter six about reinforcement within the job. Jobs that are well-thought-out usually carry a high level of positive reinforcement from managers to subordinates. **Positive reinforcement** is the action taken upon by the leader to reward someone for doing good work. Within a proper job design, subordinates are focused on attaining goals leading to further positive reinforcement. There are two positive reinforcement strategies commonly used:

- Contingent Reinforcement
- Immediate Reinforcement

Contingent reinforcement is used only when desired behaviour is exhibited. This could be a team reaching a quarterly goal, or, at the end of the day, members of a team successfully worked within the mission, vision, and values of the organization. **Immediate reinforcement** is in the name: immediate and is the positive feedback right after an action, more commonly after a good idea during a round-table discussion, or right after a phone call closing a deal with a prospective client. Regardless of the reinforcement strategy used, there is a specific set of guidelines required to provide positive reinforcement to colleagues within an organization:

- Clearly identify desired work behaviours.
- Maintain a diverse inventory of rewards.
- Inform everyone what must be done to get rewards.
- Follow the rules of immediate and contingent reinforcement (as in: don't do it just one time, and not the other times).

Reinforcement can be a very beneficial tool in helping with initial job design and desired leadership outcomes for an organization. Moving forward in this chapter, a deeper look within the job characteristics of simplification, rotation, enlargement, and enrichment will be examined. Those characteristics will outline how they can be used within an institution.

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7.2 Job Design Characteristics

Characteristics of job design have been briefly described in relation to their fundamentals of scope, depth and specialization. A deeper look into the characteristics of job design and how to apply its function within the learning organization will be discussed.

Job Simplification

Job simplification is the first level of job characteristics, given its narrow scope in relation to job design. **Job simplification** is the standardizing of work procedures and employing people in well-defined and highly specialized tasks. Automation could be an example of this, as the different forms of automation within organizations can make work easier, but does not expand on workers' levels to engage in the job. When it comes to the learning organization, automation has helped, in many ways, to enhance how individuals learn and obtain new knowledge. However, this can lead to boredom and alienation, especially when working in a team. Boredom and alienation can be detrimental to the institution, causing a higher level of absenteeism and turnover[1].

Job Rotation

The second level of job design characteristics have more involvement from both managers and subordinates. **Job rotation** is the increase in task variety by periodically shifting workers between jobs. When individuals are moved to different areas within the organization, they develop new skills, keep work fresh, and gain a more robust understanding of how everything works as a whole. In a university, it is uncommon for teachers to instruct different classes outside of the ones they have taught for a long time. In many ways, having members of a faculty (i.e. political science) switch between different classes, instructors can get a feel of a learner's different philosophies and inspirations. For example, types and styles of learners change when moving from an "Introduction to Canadian Politics" class to a "Foreign Policy of the United States" class, not to mention, it develops a professor's own robust educational leadership style when teaching different learners.

Job Enlargement

This next step uses condensing for the sake of growing. **Job enlargement** is the increase of task variety by combining two or more tasks that were previously assigned to different workers. Within a learning organization, this can be explained as one person working on research about internationalization, and another working on the admission rates of international students within the university. An administrator, or the two individuals, might combine their work as their research is closely related. This is a good way to bring in a level of rotation and collaboration within the jobs presented. However, it is important that the jobs are related. If unrelated, it can cause confusion and stagnation in the completion of goals.

Job Enrichment

The fourth and final level looks deeply at the job design. **Job enrichment** is the practice of expanding job content through job depth to create more opportunities for satisfaction. Job enrichment follows the Herzberg two-factor theory presented in chapter six; when there is enrichment, workers look inwards toward the job, and find the factors that make the job appealing (satisfier factors), and what may make the job unappealing (hygiene factors). When relating this to a learning organization, leaders, who foster learning, want to gain an even deeper learning from their subordinates. Some of the focuses might be on:

- The reason or philosophy behind the learning activity
- Specified learning outcomes

- Individual moderator variables (correlation between continuous interaction[2])

These levels all relate to how a leader or a manager attempts to improve job characteristics. Have it be through simplification or enrichment, the goal for a leader is to increase productivity, lower turnover, and have subordinates ready and willing to work. Hackman and Oldham developed a model that finds a balance between the characteristics to improve job performance[3].

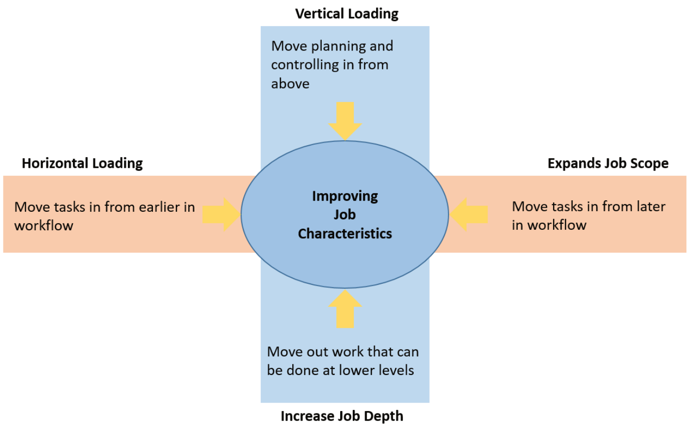

Figure 2: Improving Job Characteristics. *(Source: J. R. Hackman & G. R. Oldham, Work Redesign, 1980)*

Review Questions:

1. What are the differences between positive reinforcement and negative reinforcement?
2. Describe the characteristics of job simplification, rotation, enlargement, and enrichment?

7.3 External Organization Environment

When making sense of the external environment, it is important that all organizations are formed to achieve organizational goals. To achieve these, most look outside of their own walls to what is called the external environment. The external environment, or general environment, involves outside factors which impact the operation of the organization, in turn, causing the organization to respond and react in order to maintain its momentum[4]. Figure 3 shows some of the external environments that are present within organizations, and how they adjust in external environments.

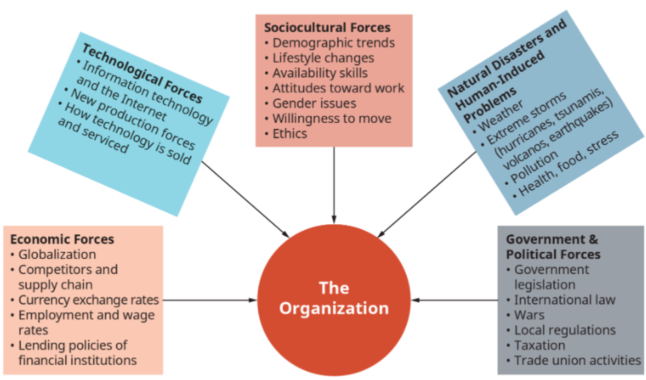

Figure 3: Macro Forces and Environments *(Source: Copyright Rice University, OpenStax, under CC-BY 4.0 license)*

The impact on the global market can determine a modern organization's place in the world. **Economic forces** are those that pertain to a company's role within its national or global economy. Overall, the impact of globalization, in general, has rendered positive effects. However, rates of household economy in 25 advanced-economy countries have dropped or remained stagnated at a rate of two-thirds[4]. There are two defining trends that have an adverse effect on the economy and are key characteristics in the external organization environment.

Technological Forces	Government and Political Forces
· If an organization can effectively enhance its usage of technology, this can render a substantial competitive advantage[4].	· In a modern economy, foreign policy and diplomacy have a big effect on how organizations operate in a global marketplace.

Outside the economy, organizational impact can have an effect on the people, not only on the inside of the organization, but also on the outside. **Socio-cultural forces** include the values, beliefs, customs and traditions of different people with regard to race, religion, gender and other socio-cultural backgrounds[4]. Within educational establishments, there are social-cultural forces that have rendered quite an impact, given the diversity of these institutions in recent years. Be it age, religion, race, gender or sexuality, leaders within learning organizations will have to be cognizant of the socio-cultural forces that effect and are identified within them.

Climate change is also an influence. **Natural disasters and human induced-problems** are issues that relate to our natural environment, including high-impact storms and the rise of CO2 emissions[4]. The public has become more cognizant, as of late, about the effects of climate change, and are aware of the effect that humans have caused to the rapid temperature change. As leaders, it is important to be interdisciplinary in these areas so that a wealth of knowledge can be presented to fellow learners and colleagues.

Review Questions:

1. What are the five macro forces of organizational environments? What are their characteristics?
2. What are the impacts of socio-cultural forces within organizations?
3. What interdisciplinary practices can be used in the organizational environment?

7.4 Corporate Culture

Image from: https://www.netclipart.com/isee/owiiTT_culture-clipart-corporate-culture-social-network-clipart/

When looking at all the factors that make up administrative behaviour, the corporate culture must be examined. **Corporate culture** focuses on the values of an organization, and relates to its socio-environmental characteristics. Peter Drucker used the famous phrase, "culture eats strategy for breakfast"[5]. Corporate culture is influential as it acts in a trickle-down manner. Essentially, culture starts from the top, and is found as it makes its way down through subordinates. In many ways, corporate culture serves two functions within the organizational system[6]:

- Adapts and integrates to its external environment
- Creates internal unity and cohesiveness to achieve goals

Corporate culture creates a standard towards how a particular organization runs. A positive corporate culture has leaders who want subordinates to work, provide autonomy, and be involved with the decision-making processes. This is found in the South-western United States-based burger chain, In-N-Out Burger, which was named one of the top companies in the world by Glassdoor[7]. Alternatively, an organization can promote vindictiveness, and unethical financial practices similar to what Enron did in the late 90’s and early 2000’s[8] (see photo of Jeffrey Skilling; chapter five).

Corporate culture, in many ways, can seem ambiguous. Therefore, how is corporate culture quantified? One strategy that has been used frequently in studying this is the **Competing Values Framework (CVF)** (Figure 4)[9]. Much like the Johari Window does for an individual’s self-awareness, the CVF allows insight into a corporation’s self-awareness and development of culture.

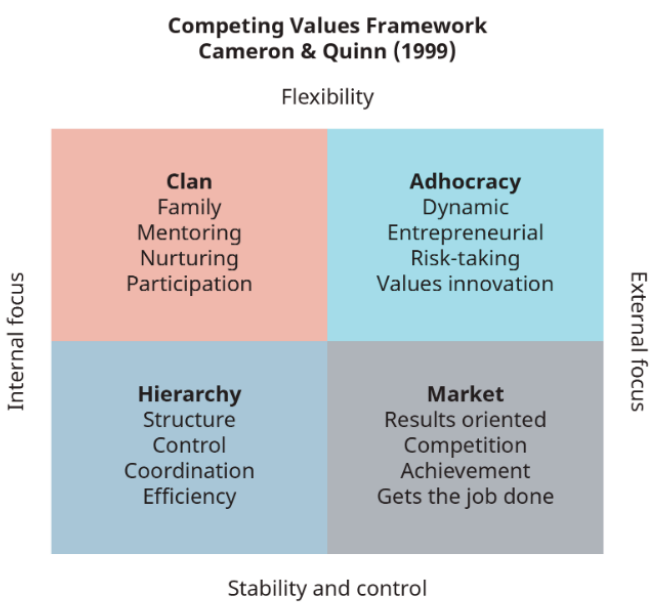

Figure 4: Competing Values Framework. *(Source: K. Cameron and R. Quinn, 1999. Diagnosing and Changing Organizational Culture, Addison-Wesley, p. 32.)*

When relating corporate cultures to learning organizations, there are similarities about how culture is effective within its walls. As the culture from head administrators influences the department heads, which then influences the faculty. However, even with a hierarchical structure in place for task delegation, faculty, for example, have a great deal of *autonomy* about how they decipher and transmit learning to students. This ability to be autonomous, and provide a learning structure that works for educator and student, promotes a healthy work environment. In many ways, the goal of fostering learning and knowledge is not only the goal of the teachers inside of a learning organization, it is also a goal all the way to the top of the administration. The role of education and its impact on future generations who enter the workforce and are part of society is the overall objective.

Activity: Case Study

- Read the case study carefully.
- Answer the question in the text box at the bottom.
- If applicable, work with a partner or a small group to get different viewpoints of the case study.
- The case study comes from: David A. Garvin, Harvard Business Review, URL: https://hbr.org/2013/11/case-study-the-costs-and-benefits-of-a-strong-culture

Case Study: The Cost and Benefits of a Strong Culture

"How long is this list of escapees?" Kumar Chandra asked as he pointed at the slide on the screen. He was the head of operations at Parivar, a midsize Chennai-based IT services company.

Everyone in the room chuckled, except for Indira Pandit, vice president of HR. Nearly 100 employees had given notice in recent weeks.

"We're losing them faster than your people can bring them in," she said, turning to Vikram Srinivasan, the head of recruiting. "Our turnover rate is up to 35%."

Vikram shook his head. "This isn't our problem. It's the Indian labour market, and it may not even be a bad thing. Some studies show that the more frequently employees move around within an industry, the more innovative it becomes."

Indira gave him a skeptical look.

"This is to be expected, Indira, especially now that we're rising above the second tier," he argued.

This time only Kumar laughed, and Indira knew why. Sure, Parivar was growing — in revenue, profitability, and reputation — but it was still much smaller than companies like Infosys, HCL, and other leading global providers of low- to midrange business-process outsourcing services. In the past decade, Parivar's charismatic CEO, Sudhir Gupta, had saved the organization from bankruptcy and made it an industry success story — but it was hardly in the first tier.

"I need to present these numbers to Sudhir at the end of the week, and I can't do that without a theory on what's happening and a solution to propose. That's why I called this meeting," said Indira.

"What about the 'People Support' idea that came up in the Future Vision exercise?" Vikram asked. Parivar had just finished its annual innovation process. Employees from all over the company, particularly new and young ones, were encouraged to join senior leaders in brainstorming and design sessions focused on how the firm could reach its goals for the year. This event, a hallmark of Parivar's inclusive culture, was meant to foster collaboration and an entrepreneurial spirit. One proposal, that had garnered attention, was the creation of a new function whose sole purpose would be to support Parivar's employees by hearing their grievances and figuring out solutions.

"I, for one, love the 'People Support' idea," Vikram added. "It emphasizes Sudhir's philosophy of genuine caring for our people."

"It sounds genuinely expensive to me," said Kumar. Indira loved his pragmatism.

"Cost aside, I'm not sure that's the direction we want to take." She pointed at the screen. "These people have told us that Sudhir's 'love culture' — our attentiveness to both personal and professional matters, isn't so alluring anymore. They don't necessarily want to feel like part of a family at work."

"Come on," Vikram said. "That's our biggest selling point. Recruits love that they won't be just a cog in the machine, that our company and its managers, Sudhir included, will listen to them, that everyone at Parivar matters."

"That expectation may attract them, but it's not keeping them here, especially when competitors offer a 30% pay raise," Indira countered. "It's what we're hearing in the exit interviews."

Vikram was clearly not convinced: "We need to go bigger. We should put our money where our mouth is with the People Support function, and show that we're 100% committed to our culture of inclusion. That's the best way to reverse the trend."

Big Brotherly Love

Amal, an associate in his twenties, had clearly prepared for his exit interview with Indira. He was checking off items on a handwritten list.

"Everyone says I'll hate it at Wipro, that it's too rigid there. But it's Wipro! How can I refuse?"

"Yes, I've heard they have the same high expectations we do, but it's more process-driven, and far less personal. Here, you get more attention from the top."

Amal smirked. "Yes, if you're one of Sudhir's clan."

"What do you mean?" Indira asked.

"Don't get me wrong. Parivar promised access to senior executives, and I got it. But Sudhir doesn't swing by the office, put his legs up, and chat with just anyone. There's an 'in' crowd. Only his favourites get that family-like attention. I guess it's understandable. One man can only do so much. But if I'm not seeing him or other top people, I'm just stuck at a company that wants to be overinvolved in my life."

"This People Support idea, for instance," he said, pointing to the last item on his list. He seemed to be on a roll, so Indira just listened. "I heard about it from my friend, who was in that Future Vision group. You have to admit, it feels a bit like Big Brother. A whole group of managers dedicated to walking around and asking about our problems. We don't need more people to talk to. We need more money." He sat back in his chair, satisfied.

"Thank you for being so candid," Indira said. "This really is helpful, and we wish you the best of luck."

A few minutes later, Amal's manager poked his head into Indira's office. "Did you get an earful?" he asked.

"I sure did," Indira said, gesturing for him to come in. "I think he'll be happy at Wipro. It seems more his speed."

"You should know that Amal is an outlier. Most people on my team are not like him. They love our company culture."

Thinking about her long list of "escapees," Indira wondered whether that was really true.

A New Best Practice

Sudhir's office, where he regularly held big meetings, was crowded with inviting, comfortable couches. Indira scanned the room as people settled in. It was a typical gathering: most of Parivar's senior leaders, including Vikram and Kumar, and a handful of younger employees.

"I've asked Nisha to tell us more about the People Support idea," Sudhir announced. "It's the brainchild of her Future Vision team. Ready, Nisha?"

Nisha, who looked to be fresh out of business school, began her slide presentation, describing how the new function would work. She included a scenario: An employee is worried about his future with the company because he has been given a time-consuming project that will involve working late, compromising his ability to look after a sick mother in the evening. Aware of the People Support function, he seeks out one of its designated "listeners," as they would be called, and explains his dilemma. The listener helps him negotiate an arrangement with his boss that allows him not to stay late every night. In Nisha's last slide, all the characters: the employee, the boss, the listener, and the sick mother, are smiling.

Everyone in the audience clapped, and Sudhir congratulated Nisha. "This is what I love about coming to work every day: Fresh ideas from smart, young people."

Not surprisingly, Kumar was the first with questions: How much would the function cost? How would it scale up as the company grew? Who would manage it? Nisha attempted to provide answers, but Sudhir interrupted before she got very far. "We must still work some things out, of course, and those all are legitimate concerns. But I think this would be money well spent."

Kumar wasn't satisfied. "OK, so we won't discuss specifics today, but what about our broader plans for growth? Will all this family stuff be appropriate outside India, when we expand to the UK and the U.S.?"

"That's also an important issue to explore. But people everywhere want their company to care about them and their lives," Sudhir said, indicating with a glance at Kumar that the interrogation should cease. "Indira, do you have any questions? This obviously falls into your arena."

Indira shared Kumar's concerns and more, but she wanted to ask something new. "Nisha, thank you for this thoughtful presentation. I was wondering if you've considered how the listeners will be evaluated. How will we know if they're performing well?"

"Retention numbers," Nisha said. "The lower our turnover rate, the better the listeners are doing."

Indira contemplated the complexity of evaluating anyone on the basis of turnover, given the volatility in the labour market. She felt queasy thinking about it, and dreaded delivering the most recent attrition numbers to Sudhir.

Vikram piped up to ask whether any other companies in India or elsewhere had tried a similar program or if Parivar would lead the way.

"As far as we know, and Nisha has researched it, no other company has done this before. Sure, HCL has its employee-first culture, but this is about truly understanding and meeting our people's needs. Nisha and I were talking earlier about how someday this might become a best practice for all of India, perhaps beyond."

Later, as everyone was filing out, Sudhir pulled Indira aside. "Thank you for going easy on Nisha. We want to encourage young people like her to put forward bold ideas, but of course, I want your honest opinion. We're meeting on Friday, yes? You had something for me?"

Honest Skepticism

Indira took the elevator to the fourth floor. She hoped her colleague and business school friend, Amrita, would be in her office.

"Thank goodness you're not busy," she joked, finding Amrita with her head down at her desk. The two women were always busy, but they had an open-door policy for each other.

Indira explained about the meeting in Sudhir's office, the People

Support function, the exit interview with Amal, and the horrible turnover numbers.

"So I'm skeptical of this People Support idea because I'm not sure we can really nurture Sudhir's love culture across an organization that's growing so fast. It's one thing as a philosophy of how he interacts with people, but building processes and formal management structures around it is a whole different story."

"That's a tough message to deliver to someone who has turned the company around, tripled revenue, and quintupled profits with that culture at the center," Amrita acknowledged. "I'm sure he thinks this is solving the problem of his limited capacity."

"But can you formalize a culture as distinctive as ours into processes and roles?" Indira wondered honestly. "Will this People Support function even work? And if it does, won't it alienate more employees like Amal? What if it worsens our turnover problem instead of fixing it? If we want to expand to Europe and the U.S., don't we need to be less like a cult?"

Amrita laughed. "You know what Sudhir likes to say: 'Cult is part of culture.' But it's not your style to just say what he wants to hear, Indira. If you think People Support is a bad idea, tell him. He'll take your advice seriously."

Indira knew she had more power than most HR heads. Sudhir wanted to run a humane company, and that meant giving her a say on big issues.

"I plan to be honest with him," Indira replied. "But another thing Sudhir always says is, 'Don't come to me with a problem; come with a solution.' If Vikram and Nisha are right, People Support could be just the edge we need against the likes of Wipro and Infosys, a way to retain our people and win new recruits. What if this helps us break into the top tier?"

"Do you really think it will, Indira?"

"I'm not sure, and I don't have any better ideas right now."

(Editor's Note: This fictionalized case study will appear in a forthcoming issue of Harvard Business Review, along with commentary from experts and readers. If you'd like your comment to be considered for publication, please be sure to include your full name, company or university affiliation, and e-mail address.)

An interactive or media element has been excluded from this version of the text. You can view it online here: https://ecampusontario.pressbooks.pub/educationleadershipmanagement/?p=367

Conclusion

Throughout this chapter, a look into how an organization uses job design as a motivating tool for employees was discussed. In addition, how leaders substantiate a positive space in the external environment and their internal environment through the use of corporate culture was explored.

A review of this chapter's major conclusions, include:

1. Job design follows the fundamentals of scope, depth, and specialization of the job in relation to job characteristics and the motivation matrix.
2. Job simplification, rotation, enlargement, and enrichment are used in order to reach a higher organizational level and increase productivity.
3. Future organizations will need to relate more to the outside world by understanding the interdisciplinary world of economic, technological, government, socio-cultural, and natural forces.
4. Corporate culture focuses on the values of an organization, and within learning organizations the concept of autonomy is important for a positive corporate culture.

These concepts of job design can be used in the next chapter on decision-making. When discussing how leaders make decisions within an organization, the factors of working in an external environment and corporate culture help to develop a framework for the most effective decisions that take place in organizations.

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PART VIII

CHAPTER 8: DECISION-MAKING

"So many decisions so little time." Decision making is an important aspect of leadership and management, not only in making the decision, but also living with the outcome.

A large portion of leaders' actions stem from decisions made about a specific situation. Being decisive can be a challenging feat for some people, but come naturally for others. One of the main issues with decision-making, is not simply making the decision, but living with the consequences. In this chapter, a general overview of decision-making, styles of decision-making, effective decision-making, and making decisions as a group will be covered.

Throughout this chapter, many topics will be presented that will help to develop decision-making ability and to understand the importance that decision-making has on a successful learning organization.

The learning outcomes for this chapter are:

1. Define what decision-making is and the people it affects.
2. Clearly identify the difference between the right answer and the ethical answer.
3. Identify the decision-making styles, and critique the issues in managerial decision-making.
4. Outline and critique some of the challenges to effective decision-making.
5. Compare and contrast how teamwork is either beneficial or detrimental to decision-making.

Chapter Tips:

- How does decision making impact your personal life?
- How does being a rational agent help someone make the right decision?
- Think of the impact groups have on decision making.

8.1 Overview of Decision-Making

Leaders, such as CEOs of large multi-national corporations, small-business owners, and administrators inside institutions of higher learning, must make decisions daily that have an effect on the organization. **Decision-making** is the action of thinking through a process and coming to a consensus, either personal, or collaborative, and following through with that action. One of the key variables in decision-making within an organization are the **stakeholders,** who are the individuals or groups who are affected by the organization (i.e. employees, vendors, customers, and shareholders)[1].

One thing to be aware of as a leader within an organization is that decision-making is a process. Processing decisions can help to make the right decision relevant for the problem that is presented, if leaders are too rash in their decision-making, it could render negative consequences. For example, if productivity is low within the administration or organization, and the first action is to fire everyone in the office, that is a rash decision that hinders the individuals and the company as a whole. Here is an effective five-step process to effective decision making[2].

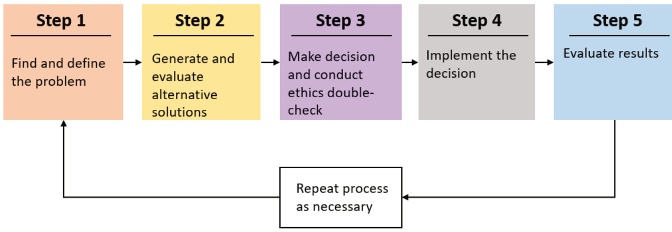

Figure 1: Decision-Making Process. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition.)*

Step three offers an interesting look in the decision-making process, and an ethical dilemma can be presented at this time. One of the main things managers have a difficult time understanding is the difference between making the correct decision and making the ethical decision. When managers or leaders make decisions, it usually does not fall on the yes or no binary, nor is there one correct answer. This brings in the issue of making the best decision out of a set of good options, or minimizing harm though a set of bad options. This is where ethical decision making comes into play. As managers, all make impactful decisions during the day, month, or year within an organization. Managers we must take into account how their decisions affect their stakeholders[3]. Therefore, the execution of ethical action in decision making should be the overarching method of decision-making.

The Right Correct Answer	The Right Ethical Answer
•Finding the best answer out of a set of options •Often the correct answer does not apply to everyone. •Sometimes it is not clear what the best answer is.	•Finding the best positive impact in the answers. •Being cognizant that the answer will have an effect on the organization. •Through strong ethical consideration, a viable choice may emerge.

Next, the focus on some of the decision-making styles that are found within organizations will be discussed. There will be decision-making exercises, so remain cognizant of the ethical implications and how decisions affect stakeholders within the organization.

Review Questions:

1. What is the definition of decision-making? Who are stakeholders?
2. What are the five steps of the decision-making process?
3. What is the difference between the right answer and the ethical answer?

8.2 Decision-Making Styles

Decision-making can come in many forms. It usually depends on the manager. Managerial theories were discussed in in Chapter Two regarding the different classical and contemporary theories present in managerial styles. In this context, there are managerial decisions that are found within organizations:

- **Structured Problems** – familiar, straightforward, and clear with respect to information needs. This can be closely related to a bureaucratic or scientific management theory.
- **Unstructured Problems** – New or unusual situations full of ambiguities and information disfluencies. With ambiguity comes an understanding, either substantiated or unsubstantiated, and relates closely to a behavioural theory.
- **Crisis Decisions** – An unexpected problem can lead to disaster if not resolved quickly and appropriately. In a crisis, perhaps a more bureaucratic, autocratic approach will be needed to alleviate harms quickly and efficiently.

Depending on the situation, the style will change based on the desired outcomes. With structured problems, expert and referent power may be the best course of action. It gives the ability to control the situation, especially during a crisis. However, if the problem is ambiguous, a more collaborative nature would work best, perhaps along the lines of in-depth thinking and challenging skeptical notions. Regardless of the approach, here is an in-depth guide to the different decision-making styles, characteristics, buzzwords, and tips.

	Description	Typical Characteristics	Buzzwords	Tips
Charismatics	experience high level of emotion about a new idea, but will ultimately rely on a balanced set of information to come to a conclusion	• enthusiastic • captivating • talkative • dominant	• result • proven • actions • easy • clear • focus	• use straightfor argument • emphasize bottom-lin results • use visual
Thinkers	can be the toughest to persuade. Impressed with arguments supported by data, and can be risk averse and slow to make a decision.	• cerebral • intelligent • logical • academic	• quality • academic • think • numbers • intelligent • plan • expert • proof	• offer plent data and analyses t support position
Skeptics	tend to be highly suspicious of every data point presented, especially any information that challenges their worldview, and often have an aggressive, combative style	• demanding • disruptive • disagreeable • rebellious	• feel • grasp • power • action • suspect • trust • demand • disrupts	• line up endorsem from peop the decision-m trusts

Followers	make decisions based on how they've made similar choices in the past, or on how other trusted individuals have made them	• responsible • cautious • brand-driven • bargain-cautious	• innovate • expedite • expertise	• deliver evidence t the risk is while play up how th proposal v be trailbla
Controllers	detest uncertainty and ambiguity, and will focus on the pure facts and analytics of an argument	• logical • unemotional • sensible • detail-oriented • accurate • analytical	• details • facts • reason • logic • power • handle • grab	• present a series of h structured argument over time

Figure 2: Decision-Making Styles.

Another decision-making style that is effective is the role of directing or delegating. **Delegating** is the use of other individuals, in a collaborative nature, to handle tasks that have initially been brought to the leader. For example, a middle-manager at a hotel is asked by the boss to work on hiring two new people, and finish the priority check-ins for the evening shift. The task of hiring two new staff-members for the operation is imperative, and should be started right away. However, the priority check-in is also important, but there is a competent front-desk agent available. In this case, the manager would delegate the priority check-in to the front desk agent which frees him or her up to start the hiring process.

Delegation is important to finding the right decisions within the organization. Delegating should have two factors present:

- Experience and knowledge of tasks
- Autonomy and accountability of the subordinates

These factors are paramount, because in order to delegate, there must be a return to the decision-making process and review of any challenges there might be when doing a task that was delegated. In addition, a sense of freedom and autonomy must also be provided to the subordinates who carry out the tasks. Staff must be provided freedom and be accountable for their actions so that they can share responsibility for the success or failure of the assignments. This ties into the ability to direct individuals as Kimani outlines in the four components of directing[4].

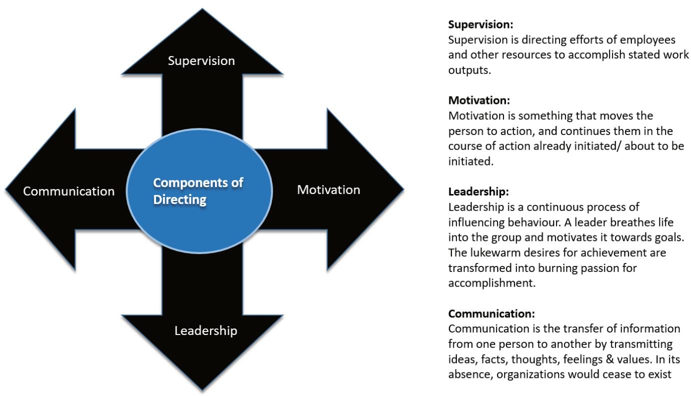

Figure 3: Components of Directing. *(Source:Gerald Kimani, Educational Management).*

Activity: Pitching For Better

Source: Williams, G., and Miller, R. (2002). Change the way you persuade. Harvard Business Review, 80, 64-73.

An interactive or media element has been excluded from this version of the text. You can view it online here: https://ecampusontario.pressbooks.pub/educationleadershipmanagement/?p=375

8.3 Challenges to Effective Decision Making

The decision-making process can pose interesting challenges to leaders. Within the world of organizations, challenges are commonly referred to as barriers in decision-making, or just barriers. There are six, distinct barriers to overcome[5].

- Bounded Rationality
- Escalation of Commitment
- Time Constraints
- Uncertainty
- Biases
- Conflict

When decisions are made within organizations, are all decisions rational in nature? Not necessarily, as within leadership there are issues where the problem or right solution cannot be grasped. **Bounded rationality** is the notion that challenging complex issues that leaders cannot fully grasp, makes them unable to be rational about the situation, and are, therefore, incapable of understanding an alternative[5]. Within learning organizations, educators would like to believe they can learn everything. However, at times there is no comprehension of a certain component of learning, thus they become a victim of bounded rationality. This can lead to incorrect decisions being made without all the information, or abandonment of an issue all together. Both produce an incomplete outcome. Overcoming bounded rationality is difficult given the old adage "you learn something new every day." With that ideal, no one is ever fully knowledgeable. Therefore, as a leader, it would be best not to work against bounded rationality, but with bounded rationality, understanding its place along continual learning.

In decision-making, it can be difficult to make a tough decision, and even more difficult to live with that decision when it does not pan out. **Escalation of commitment** is the idea that leaders and managers remain committed to a poor decision, or find it hard to remove themselves from a poor decision rationally[5]. It is hard, as a leader, to take "being wrong," but it is a learning process. In modern learning organizations, mistakes, critiquing, and revising are all parts of a divergent, learning process. Therefore, it is fine that a poor decision is made, but there are tools in place to help a learner develop new skills to overcome past mistakes, eventually removing the challenge of escalation.

When discussing time constraints, it is not necessarily discussing time management. Managers could have managed their time well, but outside circumstances could have caused an immediacy for a decision to be made. **Time constraints** are when there is little time available to collect information with rationality and make an effective decision[5]. When using the example of a university wanting to unveil a new web tool for students that other organizations have completed, time is of the essence, so the tool is launched without grasping all of the information necessary. The web tool eventually releases with numerous bugs and has to be fixed immediately. Although some instances are out of leaders' control, effective planning, forecasting, and time management can be used to alleviate time constraints.

In everyday life, no one is 100% sure of every decision that is made. If the answer is "no," not to worry, effective leaders and managers are not always 100% sure of every decision they make either. **Uncertainty** is the act of not knowing an outcome until said outcome has transpired[5] and is tied in the belief that an outcome is envisioned, but not seen. Within a learning organization, it is uncertain how to manifest learning in prospective students. Leaders can only follow a methodology that works best for the learner to absorb content. A desired outcome can be conceived of, but the uncertainty allows only sight of the outcome after the decision has transpired.

You may be uncertain on which track to choose when making a decision. However, it is important to stick to your track and see the process through. Image from https://www.anao.gov.au/work/performance-audit/management-inland-rail-pre-construction-program

One of the most common errors that leaders and managers make is trusting a poor decision based on preconceived notions. **Biases**, with regards to decisions, follow the notion that the decision made is closely tied to inherent beliefs and world views. In addition, it enhances beliefs that are similar to our own beliefs[5]. Decisions are usually made and stuck to that are our own. The idea that our initial beliefs are given more attention, we pay less attention to beliefs outside of our world view. This is called **confirmation bias**[5]. Leader's own confirmation can have an impact on how they work within organizations, and have an adverse effect on the people who do not follow their precise worldviews. One way to avoid bias is to be knowledgeable and empathetic about a contrary idea. Leaders may make a decision based on personal worldviews, but if they are acknowledging that it is coming from a form of bias, and can work with incorporating contrary views for a more collaborative decision-making process, then such influences can be circumvented.

Within an organization, leaders and managers should not be shy of turbulent issues. Perhaps not physically, or overtly verbally, but situations can be tense depending on the context. **Conflict** can be broken down into two areas within an organization:

- **Process Conflict** – conflict about the best way to find a solution, while others look for other options for a superior solution[5].
- **Relationship Conflict** – conflict between individuals that is more personal, involving attacks on character rather than ideas[5].

Regardless of the conflict, it is best to alleviate conflict at the onset. For example, if there is a conflict between two leaders within an organization, a civil sit down and discussion about worldviews, ideology, and best practices within a workplace can lead to a consensus in some areas and maybe lead to a highly effective decision to be made that makes a positive effect on an organization.

Within learning organizations, leaders and managers are constantly faced with barriers in their decision-making from personal indifference or organizational indifference. When faced with barriers, the use of expert power (Chapter Three) can be an effective tool to help avoid barriers. Being knowledgeable about a variety of situations can be beneficial for members to hear. In addition, acknowledging that they are not the beacon of knowledge, and that their decisions may have biases or be uncertain, would lead to a holistic discussion and a collaborative decision, so that everyone is on-board and accountable.

Activity: Interview Analysis

- Read the interview.
- Analyze and construct some themes from the interview.
- Formulate an idea from the interview that reflects effective decision-making.

Article source: Morse, G. (2016). Designing a bias-free organization, The Harvard Business Review, July-August. Retrieved from https://hbr.org/2016/07/designing-a-bias-free-organization

<u>Designing a Bias-Free Organization</u>

Iris Bohnet thinks firms are wasting their money on diversity training. The problem is, most programs just don't work. Rather than run more workshops or try to eradicate the biases that cause discrimination, she says, companies need to redesign their processes to prevent biased choices in the first place.

Bohnet directs the Women and Public Policy Program at the Harvard Kennedy School and co-chairs its Behavioral Insights Group. Her new book, *What Works*, describes how simple changes, from eliminating the practice of sharing self-evaluations to rewarding office volunteerism, can reduce the biased behaviorus that undermine organizational performance. In this edited interview with HBR senior editor, Gardiner Morse, Bohnet describes how behavioural design can neutralize our biases and unleash untapped talent.

HBR: Organizations put a huge amount of effort into improving diversity and equality, but are still falling short. Are they doing the wrong things, not trying hard enough, or both?

Bohnet: There is some of each going on. Frankly, right now, I am most concerned with companies that want to do the right thing but don't know how to get there, or worse, throw money at the problem without it making much of a difference. Many U.S. corporations, for example, conduct diversity training programs without ever measuring whether they work. My colleague, Frank Dobbin, at Harvard, and many others, have done excellent research on the effectiveness of these programs, and unfortunately it looks like they largely don't change attitudes, let alone behaviour. (See "Why Diversity Programs Fail" by Frank Dobbin.) I encourage anyone who thinks they have a program that works to actually evaluate and document its impact. This would be a huge service. I'm a bit on a mission to convince corporations, NGOs, and government agencies to bring the same rigour they apply to their financial decision-making and marketing strategies to their people management. Marketers have been running A/B tests for a long time, measuring what works and what doesn't. HR departments should be doing the same.

HBR: What would a diversity evaluation look like?

Bohnet: There's a great classroom experiment that's a good model. John Dovidio and his colleagues at Yale evaluated the effect of an anti-bias training program on first and second graders in 61 classrooms. About half the classrooms were randomly assigned to get four weeks of sessions on gender, race, and body type with the goal of making the children more accepting of others who were different from them. The other half didn't get the training. The program had virtually no impact on the children's willingness to share or play with others. This doesn't mean you can't ever teach kids to be more accepting, just that improving people's inclination to be inclusive is incredibly hard. We need to keep collecting data to learn what works best.

So the point for corporations is to adopt this same methodology for any program they try. Offer the training to a randomly selected group of employees and compare their behaviours afterward with a control group. Of course, this would also mean defining success beforehand. For diversity-training programs to go beyond just checking the box, organizations have to be serious about what they want to change and how they plan to evaluate whether their change program worked.

Diversity training programs largely don't change attitudes, let alone behaviour.

HBR: What does behavioural science tell us about what to do, aside from measuring success?

Bohnet: Start by accepting that our minds are stubborn beasts. It's very hard to eliminate our biases, but we can design organizations to make it easier for our biased minds to get things right. HBR readers may know the story about how orchestras began using blind auditions in the 1970s. It's a great example of behavioural design that makes it easier to do the unbiased thing. The issue was that fewer than 10% of players in major U.S. orchestras were women. Why was that? Not because women are worse musicians than men, but because they were perceived that way by auditioners. So, orchestras started having musicians audition behind a curtain, making gender invisible. My Harvard colleague, Claudia Goldin, and Cecilia Rouse, of Princeton, showed that this simple change played an important role in increasing the fraction of women in orchestras to almost 40% today. Note that this didn't result from changing mindsets. In fact, some of the most famous orchestra directors at the time were convinced that they didn't need curtains because they, of all people, certainly focused on the quality of the music and not whether somebody looked the part. The evidence told a different story.

HBR: So this is good news. Behavioral design works.

Bohnet: Yes, it does. The curtains made it easier for the directors to detect talent, independent of what it looked like. On the one hand, I find it liberating to know that bias affects everyone, regardless of their awareness and good intentions. This work is not about pointing fingers at bad people. On the other hand, it is, of course, also depressing that even those of us who are committed to equality and promoting diversity fall prey to these biases. I am one of those people. When I took my baby boy to a Harvard day care center for the first time a few years back, one of the first teachers I saw was a man. I wanted to turn and run. This *man* didn't conform to my expectations of what a preschool teacher looked like. Of course, he turned out to be a wonderful caregiver who later became a trusted babysitter at our house, but I couldn't help my initial gut reaction. I was sexist for only a few seconds, but it bothers me to this day. Seeing is believing. That is, we need to actually see counter-stereotypical examples if we are to change our minds. Until we see more male kindergarten teachers or female engineers, we need behavioural designs to make it easier for our biased minds to get things right and break the link between our gut reactions and our actions.

HBR: What are examples of good behavioral design in organizations?

Bohnet: Well, let's look at recruitment and talent management, where biases are rampant. You can't easily put job candidates behind a curtain, but you can do a version of that with software. I am a big fan of tools such as Applied, GapJumpers, and Unitive that allow employers to blind themselves to applicants' demographic characteristics. The software allows hiring managers to strip age, gender, educational and socioeconomic background, and other information out of résumés so they can focus on talent only. There's also a robust literature on how to take bias out of the interview process, which boils down to this: Stop going with your gut. Those unstructured interviews, where managers think they're getting a feel for a candidate's fit or potential are basically a waste of time. Use structured interviews where every candidate gets the same questions in the same order, and score their answers in order in real time. You should also be thinking about how your recruitment approach can skew who even applies. For instance, you should scrutinize your job ads for language that unconsciously discourages either men or women from applying. A school interested in attracting the best teachers, for instance, should avoid characterizing the ideal candidate as "nurturing" or "supportive" in the ad copy, because research shows that can discourage men from applying. Likewise, a firm that wants to attract men and women equally should avoid describing the preferred candidate as "competitive" or "assertive," as research finds that those characterizations can discourage female applicants. The point is that if you want to attract the best candidates and access 100% of the talent pool, start by being conscious about the recruitment language you use.

HBR: What about once you've hired someone? How do you design around managers' biases then?

Bohnet: The same principle applies: Do whatever you can to take instinct out of consideration and rely on hard data. That means, for instance, basing promotions on someone's objectively measured performance rather than the boss's feeling about them. That seems obvious, but it's still surprisingly rare. Be careful about the data you use, however. Using the wrong data can be as bad as using no data. Let me give you an example. Many managers ask their reports to do self-evaluations, which they then use as part of their performance appraisal. But, if employees differ in how self-confident they are, in how comfortable they are with bragging, this will bias the manager's evaluations. The more self-promoting ones will give themselves better ratings. There's a lot of research on the anchoring effect, which shows that we can't help but be influenced by numbers thrown at us, whether in negotiations or performance appraisals. So, if managers see inflated ratings on a self-evaluation, they tend to unconsciously adjust their appraisal up a bit. Likewise, poorer self-appraisals, even if they're inaccurate, skew managers' ratings downward. This is a real problem, because there are clear gender (and also cross-cultural) differences in self-confidence. To put it bluntly, men tend to be more overconfident than women—more likely to sing their own praises. One meta-analysis involving nearly 100 independent samples found that men perceived themselves as significantly more effective leaders than women did when, actually, they were rated by others as significantly *less* effective. Women, on the other hand, are more likely to underestimate their capabilities. For example, in studies, they underestimate how good they are at math and think they need to be better than they are to succeed in higher-level math courses. And female students are more likely than male students to drop courses in which their grades don't meet their own expectations. The point is, do not share self-evaluations with managers before they have made up their minds. They're likely to be skewed, and I don't know of any evidence that having people share self-ratings yields any benefits for employees or their organizations.

HBR: But it's probably not possible to just eliminate all managerial activities that allow biased thinking.

Bohnet: Right. But you can change how managers do these things. One message here is to examine whether practices that we thought were gender-neutral, in fact, lead to biased outcomes. Take the SAT, for example. Your score shouldn't have been affected by whether you're male or female. But it turns out it was. The test once penalized students for incorrect answers in multiple-choice questions. That meant it was risky to guess. Research by Katie Baldiga Coffman of Ohio State University, shows that this matters, especially for women. Among equally able test takers, male students are more likely to guess, while female students are more likely to skip questions, fearing the penalty and thus ending up with lower scores. Katie's research reveals that gender differences in willingness to take risk account for about half of the gender gap in guessing. An analysis of the fall 2001 mathematics SAT scores suggests that this phenomenon alone explains up to 40% of the gap between male and female students in SAT scores. The 2016, SAT has been redesigned so that it doesn't penalize for incorrect answers. Taking risk out of guessing means that different appetites for risk taking will no longer affect students' final scores. This can be expected to level the playing field for male and female students. Notice that the new SAT doesn't focus on changing the students' mindsets about risk, but instead corrects for different risk tolerances. After all, the test is meant to measure aptitude, not willingness to take risk. Organizations should take a page from this book: Look around and see whether your practices by design favour one gender over the other and discourage some people's ability to do their best work. Do meetings, for example, reward those most willing to hold forth? If so, are there meeting formats you can use that put everyone on an equal footing?

HBR: How can firms get started?

Bohnet: Begin by collecting data. When I was academic dean at the Harvard Kennedy School, one day I came to the office to find a group of students camped out in front of my door. They were concerned about the lack of women on the faculty, or so I thought. Much to my surprise, I realized that it was not primarily the number of female faculty that concerned them, but the lack of role models for female students. They wanted to see more female leaders: in the classroom, on panels, behind the podium, teaching, researching, and advising. It turns out that we had never paid attention to, or measured, the gender breakdown of the people visiting the Kennedy School. So we did, and our findings resembled those of most organizations that collect such data for the first time: The numbers weren't pretty. Here's the good news: once you collect and study the data, you can make changes and measure progress. In 1999, MIT acknowledged that it had been unintentionally discriminating against female faculty. An examination of data had revealed gender differences in salary, space, resources, awards, and responses to outside offers. The data had real consequences. A follow-up study, published in 2011, showed that the number of female faculty in science and engineering had almost doubled, and several women held senior leadership positions. Companies can do their own research or turn to consultants for help. EDGE, where I serve as a scientific adviser, is a Swiss foundation and private company that helps organizations across the sectors measure how well they do in terms of gender equality. A firm named Paradigm is another. I came across it when I was speaking with tech firms in Silicon Valley and San Francisco. It helps companies diagnose where the problems are, starting by collecting data, and then come up with possible solutions, often based on behavioural designs.

HBR: You said that "seeing is believing." But given the lack of senior female role models in organizations, what else can we do?

Bohnet: About a decade ago, we noticed that of all the portraits of leaders on the walls of the Kennedy School, exactly zero were of women. The portraits we display affect what our employees and our students believe possible for themselves. I can attest that it was not our intention to signal to fully half of our students that they were not made to be leaders. Rather, this was done unthinkingly. Since then we have added new portraits, including Ida B. Wells, the U.S. civil rights activist and suffragist, and Ellen Johnson Sirleaf, the president of Liberia, winner of the Nobel Peace Prize, and a graduate of the Kennedy School.

HBR: You argue that it's often a waste of time to try to debias people—but hanging portraits of women seems like a strategy to actually change individuals' perceptions.

Bohnet: I am not arguing that mindsets can never change. But what we generally find is for beliefs to change, people's experiences have to change first. Being surrounded by role models who look like you can affect what you think is possible for people like you. Sapna Cheryan of the University of Washington, for example, has shown that decorations in a computer science classroom can affect performance. Replacing the male-dominated Star Wars and Star Trek images with gender-neutral art and nature pictures strengthened female students' associations between women and careers in computer science. In another study, women who were shown a picture of Hillary Clinton or Angela Merkel before giving a public speech did objectively better than those who were shown a picture of Bill Clinton or no picture at all. So what do we do with our boardrooms and hallways that celebrate our (male-focused) history? When asked this question at a recent talk I gave at the Organization for Economic Cooperation and Development, I answered that, sometimes, we have to "hurry history." I think that presidents John and John Quincy Adams, spouse and son of the thought leader and First Lady, Abigail Adams, would be proud that her portrait now is on Harvard's walls—and of course, its presence makes a big difference to our female students.

HBR: Men may resist organizational changes favoring women because they view gender equality as zero sum—if women win, men lose. How then do you enlist men as agents of change?

Bohnet: Few men oppose the idea of benefiting from the entire talent pool, at least in theory. But some are concerned about actually leveling the playing field. In practice, of course, the blind auditions in orchestras have increased competition for male musicians, and the inclusion of women affects competition for men in all jobs. I understand that increased competition can be painful, but I am too much of an economist to not believe in the value of competition. There is no evidence that protectionism has served the world well. Enlisting men is partly about helping them to see the benefits of equality. Fathers of daughters are some of the strongest proponents of gender equality, for obvious reasons, so they can be particularly powerful voices when it comes to bringing other men along. Research on male CEOs, politicians, and judges shows that fathers of daughters care more about gender equality than men without children or with only sons. I would urge fathers of daughters to be outspoken in their own organizations and to advocate for equality, not just as a broad goal, but to actively help drive the changes I describe here: collecting baseline organizational data, promoting experiments, measuring what works, changing processes to limit the impact of our biased minds and level the playing field, and so on. A big part is, simply, continued awareness building, not just of the problem but also of the solutions available to organizations. I recently gave a talk on Wall Street to an audience that was male. I started by inviting people with children to raise their hands. Then I asked those with daughters to raise their hands. Many hands were up. I told them that this made my job easy as some of my biggest allies were in the room. It broke the ice, especially when I told the audience that my husband and I only have sons, who are great feminists, I might add, and in small ways have already brought behavioural insights to their school by reminding the principal to refer to teachers in general as both "he" and "she."

An interactive or media element has been excluded from this version of the text. You can view it online here: https://ecampusontario.pressbooks.pub/educationleadershipmanagement/?p=377

8.4 Group Decision Making

Within group decision-making, decisions not only affect the individual, but affect each member of the group. Decision-making is the method or action of thinking through a process and coming to a consensus. Therefore, **group decision-making** is the coming to a consensus with multiple individuals in a collaborative nature. Within learning organizations, the notion of collaboration can be beneficial to the advancement of learning within it. There are some common advantages and disadvantages to group decision-making within organizations.

Advantages	Disadvantages
•involving numerous people with different ideas •reduce bias in making informed decisions •effective consensus can lead to a superior outcome	•conflict can hinder process •an individual with more power exerts more influence on the group •more power leads to other members not sharing ideas

Advantages and disadvantages present two different types of representations within a group dynamic. The main advantage is that individuals within a group have a voice, leading to the process of **brainstorming,** which is the generating of a variety of solutions or possible outcomes for an effective decision[6]. On the other hand, the main disadvantage is regarded as **group-think**, which occurs when one person uses her or his power in a group process and individuals will remain silent, not to disturb the peace (i.e. going along with the flow)[6]. Regardless of brainstorming or group-think, members within a group must be held accountable for the decisions that they make. This is enhanced through more inclusion, as the more individuals are included, the responsibility and accountability is distributed equally, as opposed to an individual who makes the decision on behalf of the group. One individual makes the decision, but the accountability is still distributed equally, therefore the positive or negative outcome of the decision falls on someone who had no part in the decision-making process.

One way to develop a quality group, especially if there is a clear power dynamic present, is to add a contrarian, or a member to play devil's advocate. A member who plays **devil's advocate** reduces group-think[6], and provides an alternate view or a challenge to an individual's logic on a decision. For example, in a university meeting with professors and department heads, it may be beneficial to have a student present to offer a differing view that is contrary to the views of professors or administrators. If administrators are making decisions about students within an institution, a student who offers a contrarian view may avoid administrative group-think, and have senior members see their decision from the perspective of a student.

Group decisions are more effective when time is available for group involvement and when the problem is unclear. If there is time available, and it is necessary to tackle a difficult problem, here is a summary of some different techniques that improve group decision-making[6].

Summary of Techniques That May Improve Group Decision-Making		
Type of Decision	**Technique**	**Benefit**
Group decisions	Have diverse members in the group.	Improves quality: generates more options, reduces bias
	Assign a devil's advocate.	Improves quality: reduces groupthink
	Encourage everyone to speak up and contribute.	Improves quality: generates more options, prevents suppression of dissent
	Help group members find common ground.	Improves quality: reduces personality conflict

Figure 4: Summary of Techniques That May Improve Group Decision-Making. *(Source: Copyright Rice University, OpenStax, under CC-BY 4.0 license.)*

Within a learning organization, groups are able to share ideas and their own learning experiences that improve the quality of the learning for all members within the group. Chapter Nine we will probe in depth into collaboration within a learning organizations, and the implications it has on learning styles within a modern learning environment.

Review Questions:

1. What is bounded rationality? How do we manage it?
2. What is confirmation bias? How do we avoid it?
3. Why is it important to have a contrarian or devil's advocate in the group decision-making process?

Conclusion

Decision-making is important, not only in organizations, but in everyday life. Decisions are made on a daily basis, some which carry more weight than others, but it is imperative that leaders understand that the decisions made have an effect on individuals, and so there must be accountability for all those involved.

A review of this chapter's major conclusions, include:

1. Decision-making is thinking through a process and coming to a consensus. Within organizations, decision-making affects stakeholders (i.e. vendors, customers, employees, shareholders etc.).
2. Hopefully, leaders choose the best decision out of a set of good options, or attempt to reduce harm from a set of bad options. This is ethical decision-making, so it is not enough to pick just one option, or two options.
3. The style is dependent on the problem (structured, unstructured, and crisis). Using the best style that fits the specific problem will render the best results. One tool that can be used within decision-making styles is the role of delegation.
4. Barriers of bounded rationality, escalation of commitment, time constraints, uncertainty, biases, and conflict can be detrimental to the decision-making process. Being knowledgeable about situations and using that knowledge can help remove barriers.
5. Teamwork, for the most part is beneficial, depending on the power dynamic. If too much power is presented, that needs to be evened out to ensure a full collaborative nature.

The building of the decision-making process in groups will be explored in Chapter 9. Teams, teamwork, and collaboration will be examined. The understanding of how collaboration works within a learning organization, and some effective learning theories associated with collaboration and teamwork will be explored.

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PART IX

CHAPTER 9: TEAMS, TEAMWORK, AND COLLABORATION

Sometimes leaders and managers cannot put the puzzle together themselves, which is why teamwork and collaborati on is so important.

Taking on a difficult challenge alone can be a fool's errand, especially if it requires multiple tools, skills, or ideals that one individual may not possess. Teamwork and collaboration are vital to success within learning organizations through effective team dynamics, experiential learning, and project-based learning. Within this chapter, discussion of the learning styles associated with collaboration, the implications of online collaboration within a modern learning society, and teamwork within modern organizations will be studied.

The learning outcomes for this chapter are:

1. Describe the characteristics of teams and what makes a team effective.
2. Describe some divergent learning theories associated with collaborative learning
3. Compare and contrast the use of online-collaborative learning, and its effect on modern learning organizations.
4. Differentiate some common teamwork features within organizations.
5. Describe how a team develops within the workplace. Explain some considerations and dynamics that are present when engaging in teamwork in an organization.

Chapter Tips:

- Think about accountability, as a group or a team.
- How would experiential learning be beneficial in a team setting?
- How important is communication within a team setting?

9.1 Teamwork and Collaboration

Image: Siena College. This file is licensed under the Creative Commons Attribution 2.0 Generic license. Link: https://commons.wikimedia.org/wiki/File:Teamwork_(4705884489).jpg

Usually, teams are thought of in terms of sports. For example, the Toronto Maple Leafs of the National Hockey League are a collection of players working to achieve goals (both literally and figuratively) on the ice to achieve success. In addition, there are members of the Toronto Maple Leafs who have different goals off the ice, such as those in the front office who put together an on-ice product that the fans want to see. It also may be marketing group who effectively promote the players to the fan-base, or even the human resources' team who effectively keeps the intricate aspects of hiring, firing, and payroll afloat in the hockey organization. Regardless of the goals and the duties of the different departments, they all come together as the Toronto Maple Leafs' team.

A **team**, according to Katzenbach and Smith, is a group of individuals with complementary skills who work together to accomplish shared goals while holding themselves equally accountable for results[1]. Within the team dynamic, it is important to outline what makes a team truly effective. Some practices have been outlined by Katzenbach and Smith[2]:

- Establish urgency with performance standards.
- Select members based on skill and potential, not personality.
- Pay attention to first meetings and actions.
- Set clear rules of behaviour.
- Set and complete a few immediate tasks and goals.
- Challenge the group with fresh facts and information.
- Spend time together.
- Exploit the power of positive feedback, recognition, and reward.

Within these principals, there are guidelines that create a truly effective team atmosphere. Although a positive personality can be beneficial to the interpersonal side of teamwork, members should be selected based on skill and potential to avoid biases and possible group-think which can cause a negative effect in teams. Another important part of teamwork is setting clear rules of behaviour, especially in the realm of a learning organization. Using an institute of higher learning as an example, the syllabus that a student receives at the beginning of the semester is a guideline of assignments, due dates, and rubrics of expectations for submitted work. Looking more in-depth, a syllabus sets the rules of behaviour for creating accountability in the form of an agreement. This agreement creates **checks and balances** in which the students check and balance the professor to ensure the content is taught properly and dates are consistent. The professor checks and balances the students so that they complete assignments on time and with the expectation that outcomes are being met according to the assignments' rubrics (See Figure 1).

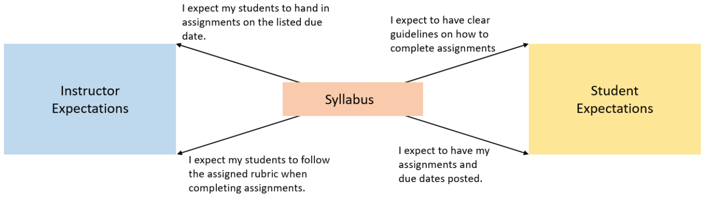


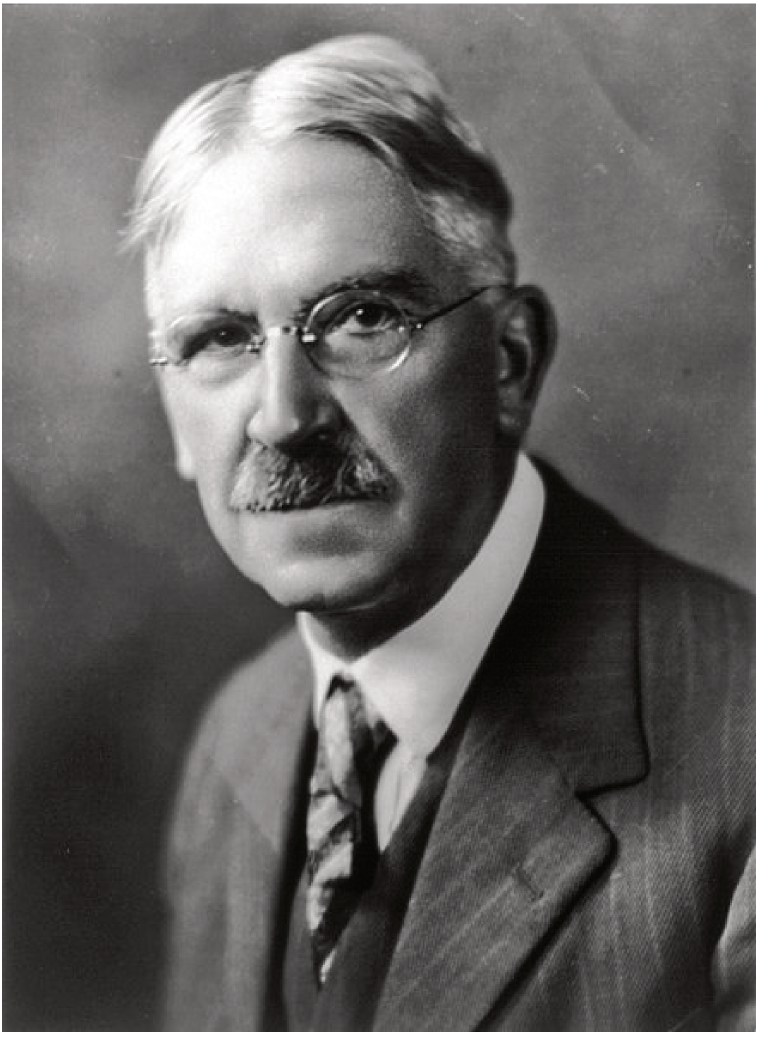
Figure 1: Syllabus Expectations.

Within these principles, there is a sense of accountability being shared between managers and subordinates. This means that both the manager and the subordinates hold each other accountable for their actions within the workplace. This fosters a more cohesive and effective dynamic between all power relationships within teamwork.

Review Questions:

1. How do Katzenbach and Smith define a team?
2. What is an example of checks and balances within a learning organization?

9.2 Using Experiential Education to Foster Teamwork and Collaboration



*Pictured is **John Dewey**, an American psychologist and educational reformer. Referred to as one of the forefathers of American pragmatism, he also was prominent in the early understanding of experiential learning. Image: John Dewey, United States Library of Congress, This work is from the Library of Congress. According to the library, there are no known copyright restrictions on the use of this work.*
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File:John_Dewey_cph.3a51565.jpg

Within education, the overall philosophy of teaching is how students will benefit from learning. As a leader within a learning organization, the role to develop a method that helps the subordinates learn, and learn effectively. One theory that finds its place within learning organizations is the theory of experiential learning. **Experiential learning** was first coined by John Dewey[3,] and later perfected by David Kolb, who describes the theory as providing empirical experience which plays a role in the learning process[4], and in many ways, connects to the concept expert power as a leader who has experiential knowledge.

The goal of experiential learning is to incorporate it in relation to real-world contexts. Bates outlines a set of design models that embed the learning within the real world[5]:

- laboratory, workshop or studio work
- apprenticeship
- problem-based learning
- case-based learning
- project-based learning
- inquiry-based learning
- co-operative (work or community-based) learning

Learning within a real-world context plays a role within leadership in teams. Most of the models presented incorporate some form of teamwork that renders success within an organization. The focus will be on how the models of project-based learning and inquiry-based learning within organizations use teamwork toward the goal of learning productivity.

Project-Based Learning

Projects (either creation, implementation, or completion) are the driving force within organizations, and arguably, what moves an organization forward. **Project-based learning** is described as providing a student, in a classroom setting, with a sense of responsibility and ownership in conducting projects with other students[5]. This method provides students with a real-world look at how to develop plans and strategies, and how to proble-solve, and delegate responsibility all within an organizational simulation, without the risk of making an actual decision. Larmer and Mergendoller claim that every student should perceive project work as meaningful, and that the process fulfills the educational purpose[5]. This means that project-based learning provides learners with the ability to experience this simulation, and be familiar when they are placed in it again in their future job endeavours.

According to Bates, a danger to project-based learning is that it can take on a life of its own and lose focus of the essential learning objectives[5]. Within learning organizations, it is important to take part in the real-world concepts, but the learning objectives should never be left to the wayside. A leader should take ownership of the project-based work and decipher whether or not the learning objectives are being achieved. If not, the leader is responsible for adjusting and making changes to the project to ensure learning is, first and foremost, the main objective of the project.

Inquiry-Based Learning

With project-based learning, the leader has a level of control within the learning process. That control is manifested by the leader who provides the groups with driving questions and guidance throughout the process[5]. **Inquiry-based learning** is similar to project-based learning, but effectively different. A leader can provide help, but learners explore their own themes, develop actions, and come to conclusions[5]. Leaders should understand their students' level of mastery before using the inquiry method. This relates to Bloom's taxonomy discussed in

Chapter Six about how to build learning through experience by providing guiding questions so that learners can eventually develop their own driving questions in an inquiry-based learning situation.

In many ways, inquiry-based learning can be based on spectrum that develops the steps needed for achievement, along with involvement from the leader or instructor. Banchi and Bell have developed different levels of inquiry-based learning to outline the actions and procedures depending on the learning environment[6].

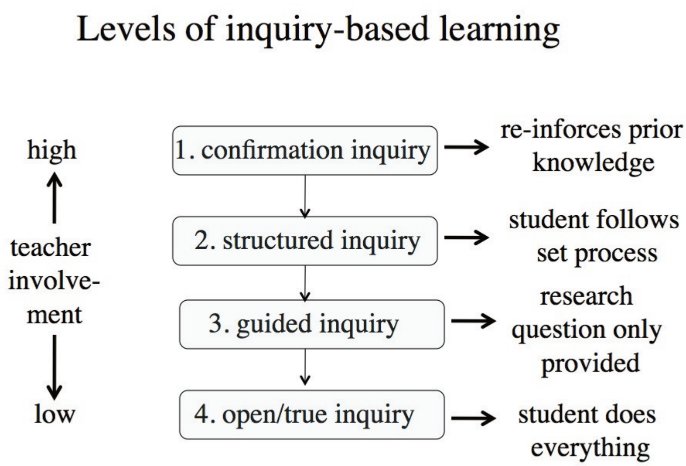


Figure 2: Levels of Inquiry-Based Learning. *(Source: Banchi, H., and Bell, R. (2008). The Many Levels of Inqury Science and Children, Vol. 46, No. 2)*

The use of experiential learning, within the framework of leadership, provides a level of autonomy for both leader and learners about how learning should be facilitated. This is at the core of experiential learning, as students develop their own learning style, and take accountability for their learning. This is vital in the framework of a institute of higher learning. As learners leave the comforts of an experiential-learning classroom environment and move toward the real-world, full of decision-making and risk, they will be more prepared to take on specific challenges leading to success.

Activity: Blindfold Drawing

Source: University of Toronto Mississauga. (n. d.). Experiential learning activities. University of Toronto Mississauga, Experiential Education Office. Retrieved from https://www.utm.utoronto.ca/experience/sites/files/experience/public/shared/Team%20Based%20Problem%20Solving%20Activities%20-%20UTM%20EEO.pdf

Blindfold Drawing

Objective: This is an activity that focuses on interpretation and communication. Once the drawing is finished, it's always interesting to see how the drawer interprets the description.

Participants: Teams (minimum 2 per team) + facilitator

Instructions/Rules: Divide everyone into groups of two or more. Have individuals sitting/standing facing away from each other. Give one side the pen and paper or black/white board and chalk/marker, and the other the picture. Those with the picture are to describe what is depicted to their other teammate(s) without actually saying what it is. For example, if the image is a worm in an apple, they are not to say, "Draw an apple with a worm in it." The person who is required to draw has to base their drawing on what they think the picture depicts, based on the verbal descriptions.

Materials Needed: Pictures, pen and paper, or black/white board and chalk/marker

Timing: 10 – 15 minutes

Outcomes/Goals: Team-based activity where clear communication is key. Forces those describing the image to be creative in their prompts, and those drawing out the image to use active listening and interpretive skills.

9.3 Online Collaborative Learning

At this point in learning about leadership within learning organizations, the impact that technology has, and will continue to have, on learning organizations in the future cannot be overstated. This supports the need for an understanding of collaboration and teamwork within a technological environment. **Online Collaborative Learning (OCL)** is defined as a model of learning where students are supported to work together, create knowledge, invent, innovate, and develop conceptual knowledge needed to solve problems[7], all while engaging in modern technology and using it collaboratively. Since the commercialization of high-speed Internet in the 1990's, online-collaborative learning became a studied phenomenon. Within learning organizations, such as universities, online components are integrated in the every-day life of a university student. One of the most common uses is online-discussion boards between classmates and the instructor. Here are some characteristics of an online-discussion board[7]:

- text based, not oral
- asynchronous: can log on anywhere, at any time, and be involved (as opposed to the synchronous method of the classic university lecture)
- threaded conversation to enhance learning through diverse options, creating dynamic sub-topics

A discussion board outlines how learning is done through an online setting and follows the core design principles of OCL. These principles are outlined as follows[8]:

1. **Idea generating:** brainstorming and divergent thinking in a group.
2. **Idea organizing:** learners compare, analyze, and categorize different ideas.
3. **Intellectual convergence:** learners reach a level of synthesis, understanding, and consensus.

When we developing an understanding about the core principles, the use of enacting mastery similar to the divergent method of experiential learning is noticed. Problem and inquiry-based methods are introduced in OCL through the use of technology and develop thinking, analysis, and consensus through a different method of transmission. Within learning organizations, it may be beneficial to incorporate alternate styles within the technology in order to develop what learning works best for all students. However, when making the learning divergent and involved, either online or in-person, learning will be achieved.

Of course, some are still hesitant to say OCL is the answer to advanced learning. Some feel that the introduction of technology creates this dooms-day effect that renders human teachers useless. This is not the case, as the goal of OCL is not to replace teachers, but to enhance the communication between teachers and learners[8]. However, it would be remiss to say there are potential limitations to OCL, and to be cognizant of when using this method is best for learners.

OCL Pros	OCL Cons
• produce deep and transformative learning. • scaffold learning, leading to higher order thinking. • embrace diverse viewpoints from a multitude of sources, providing an enhanced learning experience.	• to be used effectively, leaders and learners need to be educated in the technology. • lack of emphasis leading to a lack of cohesion. • lack of involvement will lower the amount of sources leading to a fractured learning experience.

Whether the moethod works, or not, the question depends on how the learning community responds to the implementation. After a trial run of OCL, students can discuss how it is functioning for them. One of the best ways to achieve this is to engage in a reflection with classmates discussing OCL in a start-stop-continue format. This way, learners can have feedback on what is working with OCL, what is not working, and what can be implemented to make it better. Receiving feedback does not only help the students, it develops the abilities as leaders to respond to problems and solve them effectively.

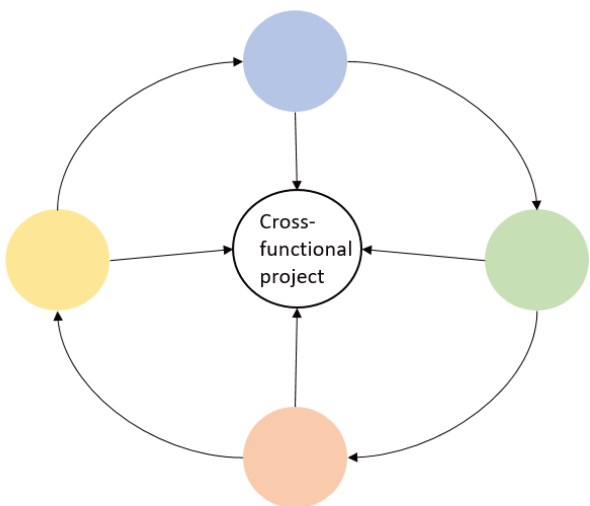
9.4 Common Features in Organizations

Looking more broadly, organizations themselves can be seen as networks of teams. They can be formed through a formal or informal process. **Formal teams** facilitate formal learning where the goal of personal development is the most important aspect[9], much like project-based learning: the project should have importance, but not outweigh the learning objective. **Informal teams** facilitate informal learning. The organizational task is the most important part and the learning outcome is secondary[9]. Essentially, in an informal structure, the hope is that the learning is inherent, and that most people within the organizational group understand a solidified learning outcome when carrying out a project. An example of an informal structure would be surveying for a political candidate. There is a script, and a general learned ability to engage members of the public, but that is secondary to completing the task of getting the questions answered by the citizens, and ensuring a vote for the candidate.

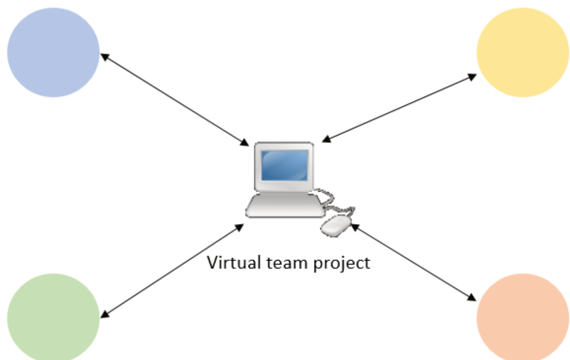
Establishing the type of organizational team identity can explore different types of teamwork styles within learning organizations. Some of the more recent teamwork trends follows three models:

- cross-functional teams
- virtual teams
- self-managing teams

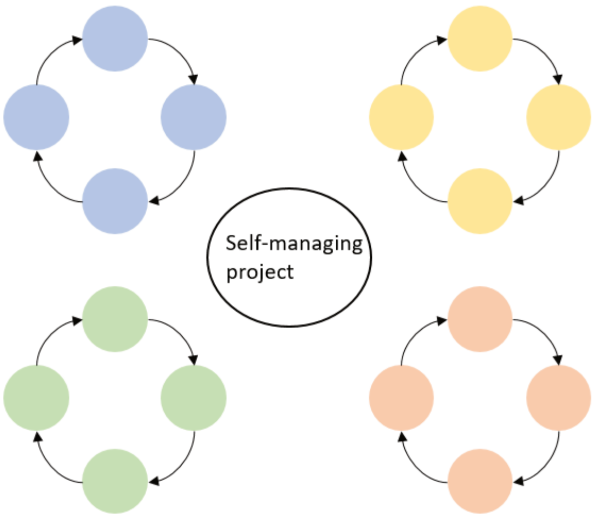
Given that learners come from different disciplines, especially in a learning organization, such as a university, it would not be out of the scope for learners to come together from different disciplines. **Cross-functional teams** are members within different groups who work together on a project. This teamwork trend follows an interdisciplinary nature that involves new ideas through cross-departmental cooperation. An example of this, in a university setting, would be the faculty of education working with the faculty of psychology to introduce a minor degree in educational psychology of elementary-school students. This brings educational expertise and psychology expertise together, merging the disciplines to create a beneficial topic for the greater good of society.



In the same thread as cross-functional teams are **virtual teams,** which can be cross-functional but are computer-orientated, rather than face-to-face interactions. One positive advantage is that effective work can be done with people outside of the geographic area. A disadvantage of virtual teams is the lack of face-to-face interaction which limits the roles of emotions during the communication process. Using the previous example, the group who has worked together on an educational-psychology minor at a school in Toronto can coordinate with a school in Vancouver virtually, and in real-time, discussing the prospects of the degree.



What about teams without a clear central figure at the helm? **Self-managing teams** are autonomous for the individuals of the group, and they are given authority about how they go about their tasks. Self-managing teams must have members who are competent working together and embrace participative decision-making, delivering better performance, decreased cost, and higher morale. In the previous sample, this would mean letting the education department and the psychology department work on the components of this minor without the central figure of the university administration managing the process. In this way, university administration allows the experts to manage their respective teams, and be available for problem-solving with events that extend beyond the scope of both departments.



Characteristics of High Performing Teams

Regardless of the teamwork methods, all members of the team have to be high performing. According to Schein, there are seven characteristics that high performing teams have[10]:

1. Clear and elevating goals
2. Task-driven, results-oriented
3. Competent, hard-working members
4. Collaborative culture
5. High standards of excellence
6. External support and recognition
7. Strong principled leadership

Review Questions:

1. What are the differences between formal and informal teams?
2. What are the differences between cross-functional, virtual and self-managing projects?
3. What are seven characteristics of high preforming teams?

9.5 Teamwork in the Workplace

When looking at some common features of teamwork within organizations, the more specific roles of a manager within an organization can be examined. Managers within team structures take on the roles of:

- team leader
- network facilitators
- team member
- external coach

These teamwork roles are very important to the success of an organization, so important that an Ipsos-Reid poll stated back in 2003, that 86% of Canadian business executives claim that teamwork is “very critical” to the overall success of their organization[11]. When focusing on teamwork in the workplace, it is important to know how teams do the work within an organization. According to Conger, Finegold, and Lawler, teams that perform their tasks efficiently, satisfy their members (stakeholders), and remain viable for future projects are seen as **effective teams**[12]. Competent teams are able to successfully harness the member inputs presented, and produce a completion of desired outcomes.

Team inputs are both physical and emotion tools used by members to complete tasks within an organization. Inputs include resources, nature of the work, team members, personal skills, and member characteristics. Hackman outlines how team inputs are implemented within an organization, which lead to organizational success[13].

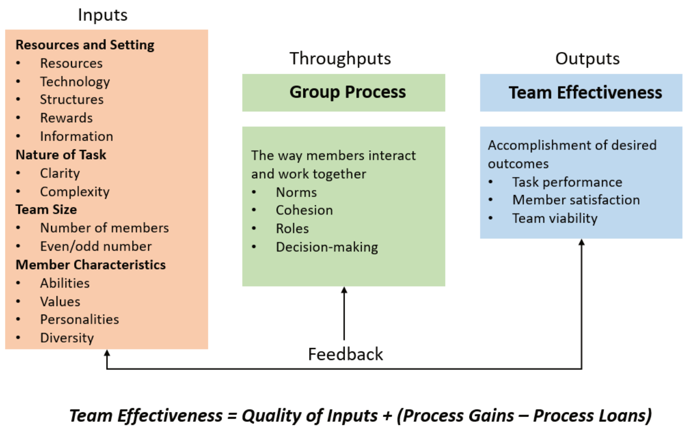


Figure 3: Inputs, Throughputs and Outputs. *(Source: J. R. Hackman, The Design of Work in Teams. 1987)*

How do teams eventually form and become effective? Essentially, it happens in stages according to educational psychologist, Bruce Tuckman, who developed the *Tuckman Stages of Group Development*. This model outlines five stages of team development[14]:

- forming
- storming
- norming
- performing
- adjourning

Figure 4 shows the stages using the axis of relationship focus and task focus. The fifth stage of *adjourning* is omitted as it explains the disbanding of the team once the project is completed[14].

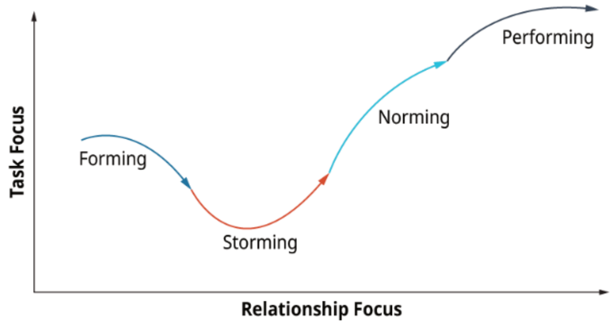


Figure 4: Tuckman's Model of Team Development *(Source: Copyright Rice University, OpenStax, under CC BY-NC-SA 4.0 license)*

In this process, team members get together and share personal goals about the project, leading to collective goals and ground rules set for the guidelines for their team. This is the **forming** stage, and is the move from an individual framework to a collaborative framework. Next, there is **storming**, when members try to avoid group-think or one individual's control on the group. Teams may experience trouble through balancing organizational and emotional factors as the storming process can be a tempestuous process, depending on the direction the group takes. It can be disorienting, moving away from personal convictions and towards a cohesive nature. At times, there may need to be a time to take focus away from the organizational factors, until the team is a cohesive unit.

Once the team is completely clear on the objectives and have established comfortable emotional factors with members, it is time to begin to develop close relationships, and focus on completing organizational tasks during the **norming** stage. The next stage is the **performing** stage, where group members are working most effectively to get the tasks completed. This is when teams are most effective and highest performing. The final stage is **adjourning.,** when members disband to focus back on individual factors, or certain members leave.

Most groups who go through this stage, engage in a learning curve, when their task focus takes a hit, but ultimately, it is beneficial for this to happen in the beginning. This produces a better relationship, as a positive relationship will help the team achieve the tasks in a more effective way. Teamwork is about balancing the dynamic of emotional relationships with organizational tasks.

With relationship factors playing an equally important role in building effective teams, the role of a leader or manager within the framework of relationship identity with organizational teams comes into question. When managing teams, the leader must create a boundary dynamic that can be fostering and concise with all members. The **boundary dynamic** is a delicate boundary between strategy, stakeholder, management, and organizational management[15]. The most precise example of this is the leader or manager relationship with a team. Managers must equally carry relationships with the team, and with each individual, when problems arise. Figure 5 outlines a triangle of relationships and responsibility for managers and leaders within a team dynamic.

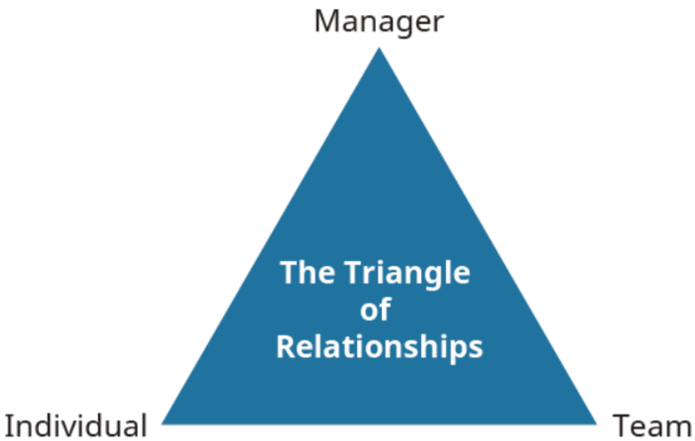


Figure 5: The Triangle of Relationships *(Source: Copyright Rice University, OpenStax, under CC-BY 4.0 license)*

Review Questions:

1. What are the roles a manager takes on within a team structure?
2. What are the five stages of Tuckman's Model of Team Development?
3. Describe the delicate boundary in which a leader or manager is involved within a team? What three areas do they have to manage?

Conclusion

In this chapter, a deep insight was developed about how teams are formed and what makes a team effective. Also examined were divergent teaching styles and learning styles to show how teamwork can be effective in learning organizations.

A review of this chapter's major conclusions, include:

1. A team is a group with complementary skills who work together to accomplish goals. Using the form of checks and balances is an effective measure to establish guidelines within teams.
2. Experiential learning, project-based learning, and inquiry-based learning are effective divergent methods to use in learning organizations. It is important to provide people with the opportunity to learn, and have them to set the course for their own learning.
3. Online Collaborative Learning (OCL) is a new way to foster learning in a modern environment, but pitfalls can be present from decreased deep communication, removing that face-to-face component.
4. The make-up of formal and informal teams use the dynamics of cross-functional, virtual, and self-managing teams, depending on the organizational goals and situations.
5. Effective teams within the workplace develop through the five stages of forming, storming, norming, performing, and adjourning. Leaders and groups, either internally or externally, need to create boundaries, and keep open lines of communication with teams and individuals.

Within this chapter, communication within teams was shown to be an important factor, especially when establishing relationships in the team-forming process. This will lead into the next chapter about communication, with a discussion on the forms of communications and their effectiveness inside of a learning organization.

Unit 3 Reflection

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PART X
CHAPTER 10: COMMUNICATION

Communication is an important part of everyday life. We communicate in many ways on a daily basis. This image shows an example of non-verbal communication.

How does one individual communicate with another individual? How do people communicate with each other in a workplace or in society? Communication is not only important within organizations, but also within everyday lives. In this chapter, communication, the communication process, communications within learning organizations, opening channels of communication, and communicative media and technology in education will be defined. The importance of communication within learning organizations, and trends on how the future will look will be outlined and explroed.

The learning outcomes for this chapter are:

1. Define communication and the communication process.

2. Define the concept of encoding and decoding.
3. Define and compare the types of communication within organizations, and describe their importance within them.
4. Define the concepts used in organizations that lead to open communication.
5. Compare and contrast the new trends in media and technology within education and learning organizations.

Chapter Tips:

- Think about the importance of communication within an organization.
- What is the importance of giving and receiving feedback?
- What are some effective communication tools to use in a learning organization?

10.1 The Communication Process

No one can go an entire day without any form of communication. It is even unlikely to happen within the first hour of the morning. **Communication** is the act of relaying messages, either verbal or non-verbal, from one person or entity to another person or entity through signs, symbols, orsyntactics. Communication is not necessarily talking to someone. It could be that when driving to a job in the morning, the act of driving itself through stopping, using turn signals, and at times, honking the horn are all forms of communication. In a way, one of the biggest safety features of the car, is the driver's ability to be communicable while driving in order to drive safely. Communication is how people interact within the environment outside themselves and in their purview. When using person-to-person communication, it is the **communication process** when a communicator encodes a message and a receiver decodes a message[1].

Figure 1 outlines a simple communication process where one individual sends an encoded message to another individual. The second individual then decodes it and offers feedback.

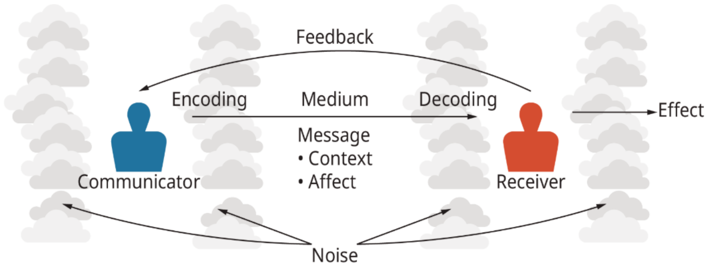

Figure 1: The Basic Communication Model *(Source: Copyright Rice University, OpenStax, under CC-BY 4.0 license)*

Two very important parts of the communication process is the encoding and decoding of messages. **Encoding** is the process where individuals initiating the communication process send out a set of systematic symbols[2]. For example, when saying, "Hello, how are you today," that is using the systematic symbol of language to create a common code for the receiver. **Decoding** is the receiver accepting the encoded message as an interpretation, after which the receiver provides **feedback** which is, in many cases, the final stage, and usually communicates a message of acknowledgement of the coding process[2]. In this example, the decoding is the individual recognizing the greeting and responding with "I'm fine, how are you?" and then the process either continues or ends.

Another part present in the communication process is the introduction of noise. **Noise** is the way encoding and decoding can be distorted by a variety of elements[2]. Noise can come from a plethora of problems including physical distractions, poor channels, and cultural disconnect.

Review Questions:

1. What is communication and the communication process?
2. What are two important parts of the communication process?

10.2 Organizational Communication

Within organizations, communication is used widely throughout the organizational structure. To achieve **effective communication,** the sender's message is fully interpreted and understood by the receiver. When communication is effective, it provides the receiver the ability to understand what is said and either act, or provide a concise response to the sender, engaging in effective conversation. Effective conversation is best when the communication can be delivered at minimal cost of resources, which is referred to as efficient communication. **Efficient communication** is when a manager tells an employee something, using jargon or colloquialisms, and the employee understands completely and then carries out a task. On the other hand, the use of jargon and colloquialisms might not be the best way to foster efficient communication if the employee does not understand them/ This means that leaders and managers have to be flexible with the language they use in order to foster efficient communication with all members inside the organization.

There are many ways effective and efficient communication can be relayed. One of the most common is **oral communication**, which is the exchange of messages that are spoken and understood[3]. With oral communication being quite common, spoken messages go hand-in-hand with listening. Listening, in many ways, is receiving the message from the sender. However, in organizations, the goal is to achieve the process by taking action to help someone say what is actually meant. This is referred to as **active listening**. Active listening is important to understanding and interpreting the message by creating an effective action with the communication presented. There are rules to active listening that must be followed when receiving a message:

- listen for the message transmission
- listen for feelings
- acknowledge all cues
- paraphrase and restate

Following these rules allows the receiver to fully understand the content being presented. Active listening is especially important in organizations where learning is being fostered, given that learners learn at different rates and levels. Effective communication and active listening are vital to transmit learning to all levels of students. For example, teachers who use oral communication need to be effective in their transmissions, so that students who are actively listening can relay back and restate the ideas presented. Teachers in classrooms are leaders, and if students cannot comprehend the messages, teachers may have to refine their oral communication to allow for active listening to be present.

What if oral communication doesn't work? There are other forms of communication that allow learners to become active listeners. **Written communication** includes email messages, texts, reports, and other annotations relayed from messenger to receiver for precise information[3]. When something particular needs to be mentioned, or a set of specific steps need to be followed, the use of written communication can be effective in relaying the exact steps. The active listening of written communication is the following of the detailed instructions. For example, the teacher might say, "The final assignment should be at least seven pages". One student may interpret that as seven pages in any format, whereas another student may not feel "seven pages" provides enough information, and might ask for more detailed guidelines. The teacher then may provide a specific rubric that states that the final assignment must be a minimum of 1,700 words, double-spaced, in the size 12 Times New Roman font. This is the precise information that is needed, in many instances, to provide a more complete interpretation of the information being transmitted.

There is another form of communication that does not incorporate reading or writing: **nonverbal communication** [3]. The use of physical examples, such as eye movement and hand gestures, or environmental examples, such as using a turn signal in a car, or even a billboard are some forms of nonverbal communication. For example, if communication cannot be transmitted through oral or written communication, a they might use images or hand gestures to illustrate their points. This heightens two senses in the students because they need to use their ears and eyes to accept and understand the information from the teacher. Nonverbal communication transmission can be effective for many individuals, but problems can appear in environmental examples, which segways into connecting communication with social influences.

Communication, either oral, written or nonverbal, is a social process[3]. Figure 2 outlines the many social influences that are present within an organization, which can be mirrored in an organization of learning:

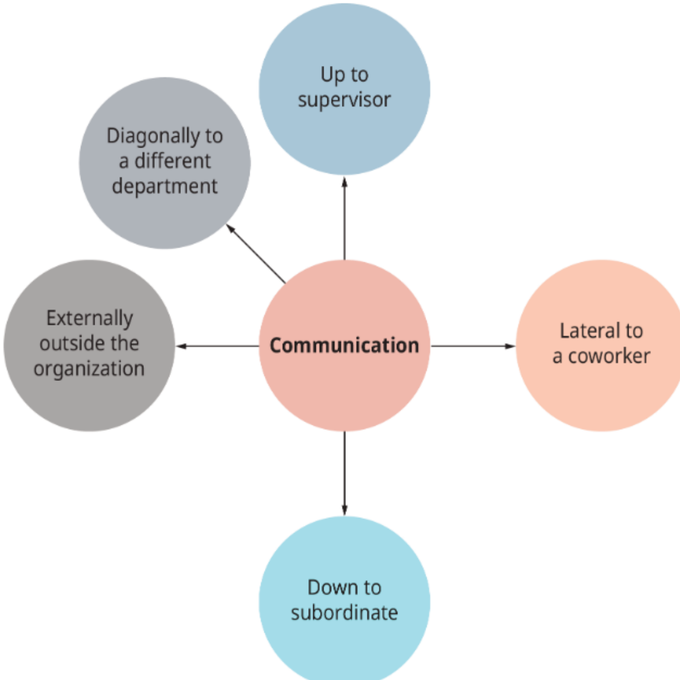

Figure 2: Patterns of Managerial Communication *(Source: Copyright Rice University, OpenStax, under CC-BY 4.0 license)*

One communication component that is prevalent in learning organizations is the concept of feedback and ensuring that learning is happening with the student present. **Feedback** is the process of verifying information or the reaction about a product or process, which attempts to foster improvement. With learning, it is important to give learners feedback to ensure that they are progressing through higher-order levels of learning. Teachers need to go one step further, however, and ensure that the feedback is useful and the student is progressing. This is called **constructive feedback** and it ensures that someone is being provided a path for improvement. Here are some guidelines to ensure that feedback is constructive:

- provide direct feedback based on trust
- ensure feedback is specific
- ensure feedback is valid
- give feedback in small doses

All these forms, within learning organizations, help build the communication process through better understanding and conceptualization. It is clear that communication takes many forms, and that some are more relevant to the situation than others.

<<Why you think you're right; even if you're wrong – Julia Galef>>

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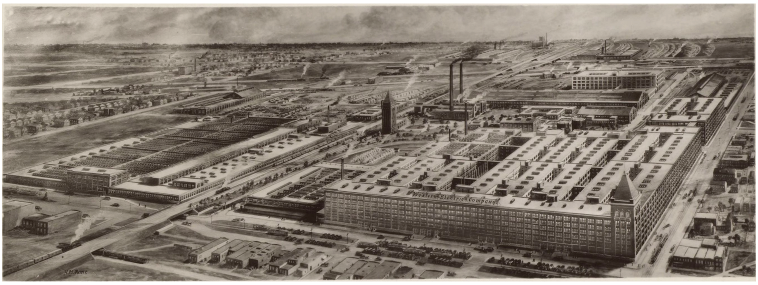
https://ecampusontario.pressbooks.pub/educationleadershipmanagement/?p=401

10.3 Opening Channels of Communication: Elton Mayo and the Hawthorne Study

In Chapter Two, the concept of behavioural management and the use of Elton Mayo's Hawthorne Studies were discussed in order to understand workers' needs within a company or organization. Focusing on psychological and physical needs are forms of communication. This classical study focused on telephone-line workers at the Hawthorne Western Electric Plant. Changes in the work space of a private room were used to enhance productivity. They initially attempted to examine the effects of lighting to this end[4], and it eventually turned into an understanding of job redesign. Additional pay increases and break times motivated workers to become more productive leading to the theory of the **Hawthorne effect.** This is "the phenomenon that employees perform better when they feel singled out for attention or feel that management is concerned about their welfare"[4].



An artist's rendering of the ***Western Electric Company in Hawthorne, Illinois****, 1925. (Source: Western Electric Company Photograph Album, 1925. This work is in the public domain in the United States because it was published in the United States between 1924 and 1977 without a copyright notice. https://commons.wikimedia.org/wiki/File:Hawthorne,_Illinois_Works_of_the_Western_Electric_Company,_1925.jpg)*

What does the Hawthorne study say about communication? When workers were provided breaks, shorter work weeks, and pay incentives, these enhanced the moral of individuals. This, in turn, strengthened the communication between employees at Hawthorne Western Electric. The morale of the individuals who share ideas about the company incentives and discuss their personal feelings to others within the organization is referred to as **interpersonal communication**[5]. Interpersonal communication within workplaces is prevalent in modern times, but its roots, in many ways, can be traced back to the Hawthorne experiment. A revision to the Hawthorne effect can be when employees are able to positively, personally, and emotionally communicate their objectives, in the workplace, about their personal welfare. This can produce motivated workers who are more productive.

Interpersonal communication changes the dynamics of leaders and subordinates within organizations. This is because opening channels of communication through physical and emotional factors within the workplace is beneficial to productivity and employee morale. Open communication about space design can be an effective measure when relaying information to an individual. One way of seeing this, is how leaders or managers organize the seats in their office[6].

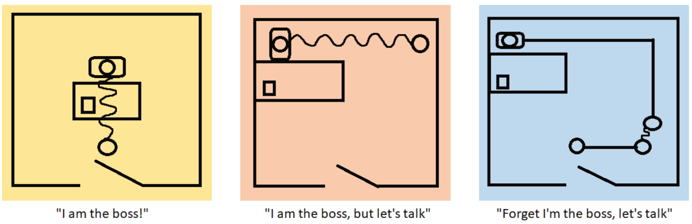


Figure 3: Space Design. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition.)*

Essentially the concept of interpersonal communication is the key factor for opening up channels of communication within the workplace, and when opening up channels of communication you can engage in communication richness. **Communication richness** is how effective and holistic the communication media is depending on the communication tool used. This can be viewed as a spectrum, such as Schermerhorn and Wright exemplify in how a manager chooses a communication channel and which one provides the most richness[6].

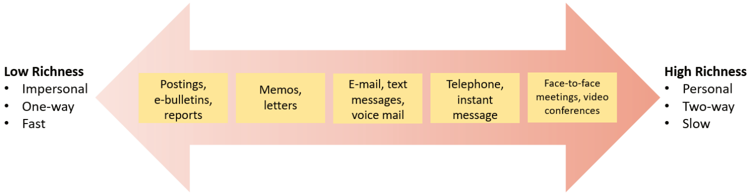


Figure 4: Channel Selection. *(Source: John R. Schermerhorn Jr. and Barry Wright, Management: 3rd Canadian Edition.)*

When it comes to organizational communication and opening up channels of communication, it is important for leaders and managers to understand the possible limits of the various methods and use them effectively depending on the situation. Regardless of the medium, the concept of interpersonal communication must be presented to foster success, or in the case of learning organizations, deep learning.

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10.4 Communicative Media and Technology in Education

Within this modern environment, communication has come a long way since the days of Elton Mayo and his Hawthorne Study. The advancement of technology has given people the ability to communicate locally and globally faster than ever. For this section, **media** will generally be described as information displayed from a source (i.e. leader, manager, educator etc.) through a medium (i.e. oral communication, written communication, and nonverbal communication) towards the receivers (i.e. learners, subordinates, students, etc.).

Cast and crew race to get ready for the NBC Nightly News. Image: NBC Nightly News with Ann Curry, This file is licensed under the Creative Commons Attribution 2.0 Generic license. https://commons.wikimedia.org/wiki/File:NBC_Nightly_News_with_Ann_Curry.jpg

One example of media is the broadcast. The anchor on the news station reports news to millions of homes at 6pm and 11pm. Similarly, this is the definition of **broadcast media transmission** as it follows a one-to-many approach[7]. A more collaborative atmosphere is **communicative media transmission**, which is a many-to-many approach[7], where transmission comes from a source and from other transmitters. One example is when there is a town-hall debate for a political office that invites cooperation from the audience, or a live event on YouTube. Not only are the candidates transmitting information, but the individuals in the crowd are transmitting information to the candidate and other audience members. Figure 5 shows a visual between broadcast and communicative media.

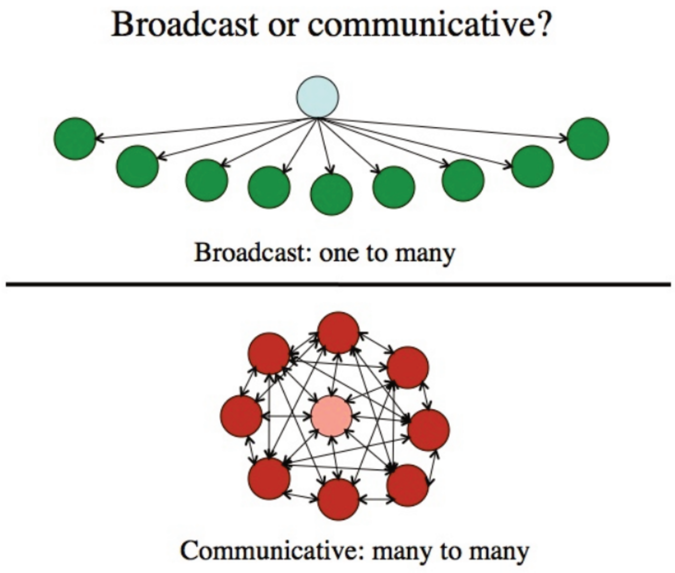
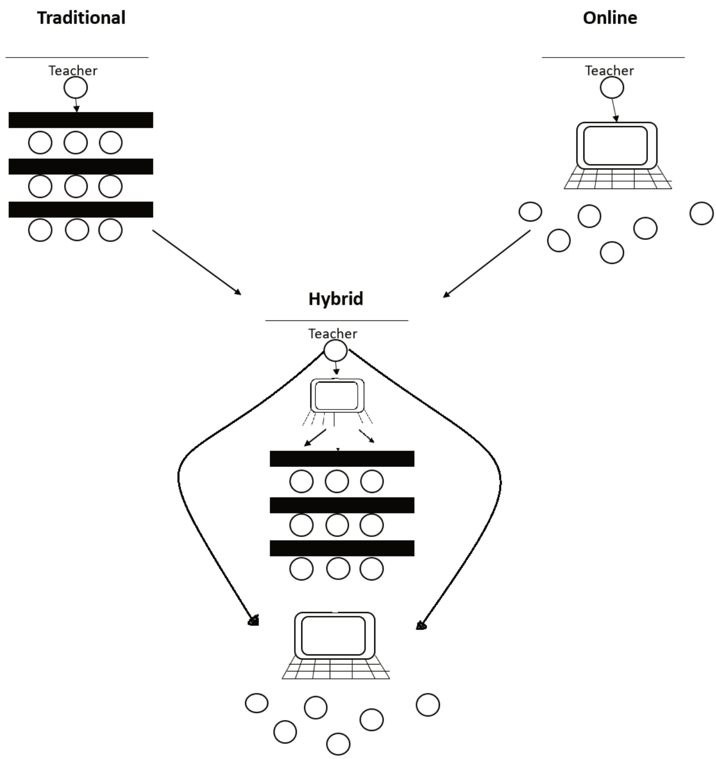


Figure 5: Broadcast or Communicative? *(Source: A. W. Bates, Teaching in a digital age: Guidelines for designing teaching and learning. Licensed under a CreativeCommons Attribution – NonCommercial-ShareAlike 4.0 International License, 2015)*

This shows how technology is introduced into learning organizations, acting as the new medium between the source and the receiver. The **electronic grapevine,** or the grouping of different electronic mediums, connects organizational members in many different ways. One example is how most modern phones have the ability to check e-mail. This creates an electronic grapevine from the office to the home, since e-mail can be available ion many devices. Some might say that this is a positive innovation, because the nature of a fast-moving twenty-first-century environment, while another might say that with this grapevine, there is never escape from work, which can be detrimental.

In learning organizations, such as schools, the advancement of technological communication, from online textbooks, to quick access of online journal articles, and the use of computerized technology has and will continue to be present. One example of teaching and learning that has used the characteristics of both broadcast media and communicative media transmission is the use of the hybrid classroom. **Hybrid classrooms[/pb_glossary,]** as described by Penn State University, is a transmission approach to delivering course content either separately or with face-face and online connections[8]. The advantages to hybrid classrooms, or hybrid learning, are that it reduces the seat time of individuals, and students can engage in authentic and collaborative learning experiences[8]. In addition, it accommodates the hours of adult learners, allowing more flexibility with time. On the contrary, hybrid teaching can use a lot more resources than the traditional face-to-face method, and still be less integrative, depending on class size. However, the fact that an individual can choose to experience the class traditionally through a face-to-face method, or with divergence through an online method is completely up to the students learning and their objectives toward learning.



Traditional, Online, and Hybrid Teaching.

Regardless of the media or medium, it must be beneficial to all learners, and help foster learning effectively. Depending on the type of study, both lecture and online learning may not be the best forms of communication transmission. For example, most high school music classes generally have brief lecturing and hardly any online component. Predominantly, music classes are experiential and authentic, by working through sheet music and playing the instrument collaboratively with others in the class. Leaders must find the most effective way to harness the learning experience, and decide if the hybrid method will deliver learning effectively.

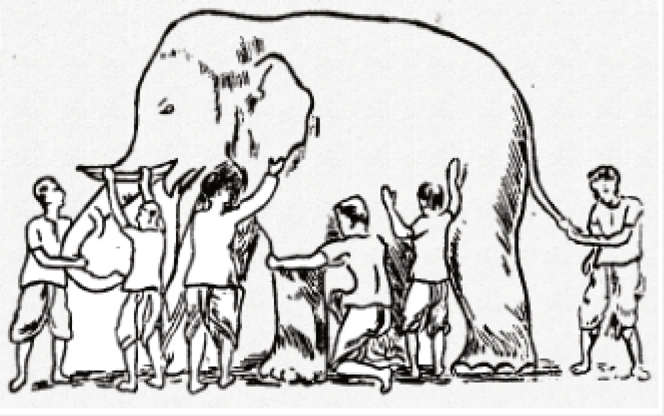
Activity: Elephant and the Blind Men

- Read the story.
- Answer the questions below.
- Feel free to work as an individual or in a group.

Retrieved from: Elephant and the Blind Men (n.d.). Retrieved from https://www.jainworld.com/literature/story25.htm

<u>Elephant and the Blind Men</u>

Once upon a time, there lived six blind men in a village. One day the villagers told them, "Hey, there is an elephant in the village today."



They had no idea what an elephant is. They decided, "Even though we would not be able to see it, let us go and feel it anyway." All of them went where the elephant was. Everyone of them touched the elephant.

"Hey, the elephant is a pillar," said the first man who touched his leg.

"Oh, no! it is like a rope," said the second man who touched the tail.

"Oh, no! it is like a thick branch of a tree," said the third man who touched the trunk of the elephant.

"It is like a big hand fan" said the fourth man who touched the ear of the elephant.

"It is like a huge wall," said the fifth man who touched the belly of the elephant.

"It is like a solid pipe," Said the sixth man who touched the tusk of the elephant.

They began to argue about the elephant and everyone of them insisted that he was right. It looked like they were getting agitated. A wise man was passing by and he saw this. He stopped and asked them, "What is the matter?"

They said, "We cannot agree to what the elephant is like." Each one of them told what he thought the elephant was like. The wise man calmly explained to them, "All of you are right. The reason every one of you is telling it differently because each one of you touched the different part of the elephant. So, actually the elephant has all those features what you all said."

"Oh!" everyone said. There was no more fight. They felt happy that they were all right.

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Conclusion

This chapter focused on communication and how it effects organizational and everyday lives. Communication, the communication process, and how to effectively and efficiently communicate to others was discussed. Communication's role within learning organizations and how the technological medium has influenced changes in learning organizations.

A review of this chapter's major conclusions, include:

1. Communication is the act of sending messages, either verbal or non-verbal, from one person to another. The communication process is the encoding and decoding of messages.
2. Encoding is initiating the communication process, whereas decoding is interpreting the message, ready to offer feedback.
3. Effective and efficient communication in organizations is done through verbal, written, and non-verbal messaging. An effective rubric for ensuring good communication is giving and receiving constructive feedback.
4. The Hawthorne Effect started the idea of communication openness through interpersonal communication and communication richness.
5. Correlating media with transmission in teaching, divergent methods of online and hybrid classrooms have been modern advancements of learning within organizations.

A view of the principles on leadership and management have been developed. Effective speaking and listening skills, paired with assertiveness and supportive verbal communication, will be explained in the coming chapters to support the development of future effective leaders within learning organizations.

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PART XI

CHAPTER 11: MULTICULTURAL LEADERSHIP

Pierre Trudeau *declared in 1971 that Canada would become a multicultural nation. The Multiculturalism Act of 1988 was eventually passed by Prime Minister Brian Mulroney signifying Canada as the first nation to adopt a multiculturalism policy.*

In this chapter we will return to the large scale ethno-cultural aspects of leadership and management through the understanding of multiculturalism within learning organizations. In many ways multicultural leadership draws inferences from leadership, management, ethics, social responsibility, motivation, decision-making, collaboration and communication. Placing multiculturalism at this point acts as a book-end and reminder of the path you have taken on this journey through leadership and management in a learning organization. Throughout this chapter we will discuss an introduction to workplace diversity and the types of diversity presented; in addition, we will provide a base understanding of legislation, ethical considerations, respecting the motivations of others, communicating diversity in teamwork, and the impact of diversified relationships in a global environment.

The learning outcomes for this chapter are:

1. Define diversity and different types of diversity concepts presented in the workplace.
2. Define what legislation has been passed that relates to multiculturalism, and diversity in the workplace.
3. Contextualize the process of respecting the rights and motivations of others.
4. Compare and contrast the impact of diverse and multicultural teams within learning organizations.
5. Define and contextualize the effect of diversity within a globalized marketplace.

Chapter Tips:

- What can you make of diversity from your previous experience?
- How has the law been effective in understanding diversity?
- Understand that different culture have different ways about communicating within a diverse atmosphere.

11.1 Introduction to Workplace Diversity

Before we define diversity, we must define what multiculturalism is. Multiculturalism has a broad definition as its impact spread through sociological, political, and colloquial use. To summarize, **multiculturalism** is the process of ethnic pluralism within a state or society through legal, social, and economic factors. The concept of ethnic pluralism means "more than one" ethnicity in a state or society (i.e. Canada or Canadian society), and how multiple ethnicities interact in the legal, social, and economic aspects of that state or society. With different ethnicities comes different identities and influences; **diversity** are the identity-based differences between people[1] and **workplace diversity** are the identity-based differences of processes or outcomes within a work environment.

Within workplace diversity, you have what is called **managing diversity** which refers to the action that a leader takes to ensure all members of an organization or workplace are treated fairly and valued within organizations[1]. As a leader within a learning organization, it is important that the learning goals you are working towards should go hand-in-hand with managing the diverse aspects of all your learners. With different ethnicities, backgrounds, and life experiences; it is important to develop a framework that is *diverse-cognizant* to ensure that learners are comfortable to learn in a diverse setting.

How does one see diversity to effectively manage it? One way to view diversity is through deep understanding of the types of diversity that are commonly present within organizations. Some topics at the onset of teamwork may be too personal to share and may not need to be presented; however, over time different surfaces of diversity may produce which can lead to a further understanding of an individual or group. Here is a set of different types of diversity that are present within organizations and everyday life[1]:

Types of Diversity (Attribution: Copyright Rice University, OpenStax, under CC-BY 4.0 license)

Surface-level diversity	Diversity in the form of characteristics of individuals that are readily visible including, but not limited to, age, body size, visible disabilities, race or sex.
Deep-level diversity	Diversity in characteristics that are non-observable such as attitudes, values, and beliefs, such as religion.
Hidden diversity	Diversity in characteristics that are deep-level but may be concealed or revealed at discretion by individuals who possess them, such as sexual orientation.

When a leader or a manager is able to effectively manage diversity efficiently it can produce both economic and social benefits. With diversity in the workplace, one particular study by Cox and Blake conclude that diverse work organizations create a competitive advantage in areas of cost structures and human resources[2]. In addition, organizations that embrace a culturally diverse environment show benefits in three organizational areas[2]:

- Creativity.
- Problem Solving.
- Adapting to change.

Figure 1: Managing Cultural Diversity. *(Source: Copyright Rice University, OpenStax, under CC-BY 4.0 license)*

However, there have been some reported negatives when the topic of diversity is brought up within organizations. One of the biggest challenges that face managers within diverse organizations is **lower organizational attachment**; which is when after diversity is presented in an organization, another group feels alienated[3]. An example of this can be the act of reverse discrimination within the workplace which is described as a dominant group receiving discrimination from a diverse class of citizens[3]. This can lead to a wedge in the organizational makeup between different diverse groups, eventually leading to a shortage of goals met.

This leads to the importance of managing diversity effectively ensuring all members regardless of dominance or marginalization be managed in a way that is fair, consistent, and valued. Not only can it avoid emotional rifts within your organization. It can help you keep out of trouble with the law, which is our next section in this chapter, dealing with legislation.

Review Questions:

1. Define multiculturalism and diversity?
2. What are the three types of diversity presented in an organizational structure?
3. Cox and Blake say that a diverse organizational environment is beneficial in what three organizational areas?

11.2 Understanding Legislation and Diversity

At this point in this chapter, we feel it is important to offer some insight of legislation that has been passed in regards to diversity. In today's age the legal system is used in conjunction with diversity to combat discrimination in the workplace[3], and each country has their own ways on combating discrimination not only within organizations, but within civil society.

Canada

We previously mentioned at the beginning of the chapter that former Prime Minister, Pierre Trudeau declared that Canada will be a multicultural nation in 1971, followed by the adoption of the Multiculturalism Act of 1988 by Brian Mulroney. In between 1971 and 1988, we adopted the *Canadian Human Rights Act* (R. S. C., 1985, c. H-6) which purposes:

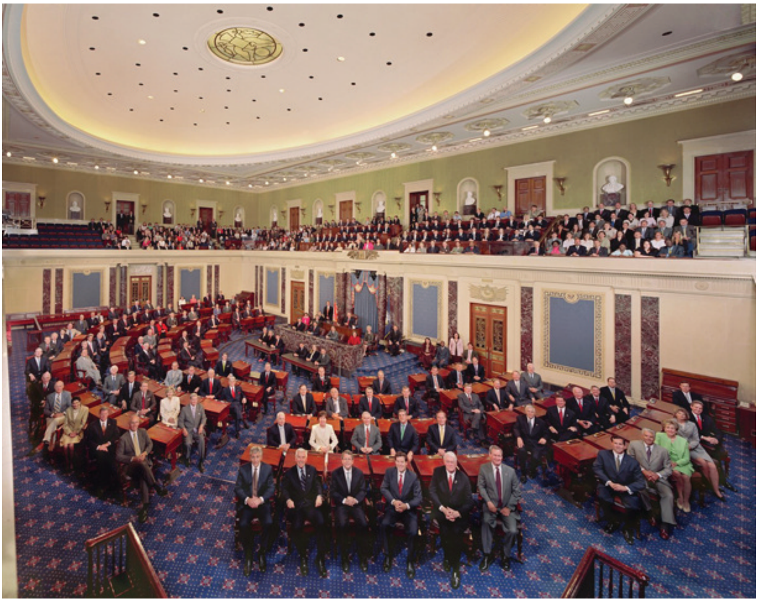
> "[T]hat all individuals should have the opportunity with other individuals to make for themselves the lives that they are able and wish to have and to have their needs accommodated, consistent with their duties and obligations as members of society."[4]

This act is the key legislative tool protecting individuals in Canadian society against discrimination based on an individual's race, religion, age, sex, sexual orientation, gender identity, marital status and others[4].

In regards to workplaces and organizations, sections 7 to 11 of the *Canadian Human Rights Act* focuses on employment within organizations. The act focuses on employment, hiring, wages, and value of work with an emphasis that it is discriminatory to refuse employment, collude against, provide unequal wages, or adjust the criterion of work relative to the skill[4]. Canada has a strong safety net in regards to preventing discriminatory practices in the workplace, leaders and managers within all organizations are cognizant of the laws presented which aim to protect all members.

United States

The United States have a deep history with discrimination and legislation; not to mention, a rich history of legislation with such venerated articles as the *Constitution of the United States*. The acknowledgement of discrimination and the legislation to hinder discrimination came about over two decades before Canada with the *Civil Rights Act of 1964*(H. R. 7152) which purposes that a "[prohibition] of discrimination in public places, [providing] the integration of schools and other public facilities"[5].



The Civil Rights Bill was passed in the Chambers of the US Senate, 1964. This work is in the public domain in the United States because it is a work prepared by an officer or employee of the United States Government as part of that person's official duties under the terms of Title 17, Chapter 1, Section 105 of the US Code. https://commons.wikimedia.org/wiki/File:US_Senate_Session_Chamber.jpg

Within the workplace key titles and amendments have been introduced and put into law since 1964. Enforced by the U.S. Equal Employment and Opportunity Commission, circa 1964, administers and enforces the civil rights laws against workplace discrimination[6]. Below is a list of key diversity-related legislation:

Key Diversity Related Legislation
(Attribution: Copyright Rice University, OpenStax, under CC-BY 4.0 license)

Title VII of the Civil Rights Act of 1964	Created the Equal Employment Opportunity Commission with the primary role of making it illegal to discriminate against someone in the workplace due to their race, national origin, sex, disability, religion, or pregnancy status.
Equal Pay Act of 1963	Mandates that men and women must be given the same pay for equal work.
Age Discrimination in Employment Act (ADEA)	Forbids discrimination against individuals who are age 40 and above.
Americans with Disabilities Act (ADA)	Prohibits discrimination against people with disabilities in employment, public services, public accommodations, and in telecommunications.
Pregnancy Discrimination Act (PDA)	Prohibits any discrimination as it relates to pregnancy, including hiring, firing, compensation, training, job assignment, insurance, or any other employment conditions.
Family and Medical Leave Act (FMLA)	Grants new parents up to 12 weeks of paid or unpaid leave to care for the new child, and gives nursing mothers the right to express milk on workplace premises.

Europe

Within the European Union (EU), anti-discrimination laws within the workplace are also present. Beginnings of anti-discrimination were founded in the *Treaty of Amsterdam* in 1997 with Article 6a in the document stating that members within the EU are to "combat discrimination based on sex, racial or ethnic origin, religion or belief, disability, age or sexual orientation"[7].

Since the *Treaty of Amsterdam*, acknowledgement of discrimination in places of work saw the adoption of the EU Employment Equality Directive to extend a protection of rights against discrimination "by explicitly obliging the Member States to prohibit discrimination in employment on the grounds of religion or belief, age, disability, and sexual orientation"[8]. These directives act as a check and balance to ensure all member nations within the EU are following the directives of preventing discrimination in the workplace. Another key impact of this legislation is that it is **multilateral** (encompassing more than one country) in its approach, here are some of the countries where this multilateral approach applies[9]:

- Austria
- Belgium
- Denmark
- France
- Germany
- Italy
- Netherlands
- Spain
- Sweden
- United Kingdom

Why Know About Legislation?

It is important to know about legislation as a leader within a learning organization or any organization to develop an understanding of working within the laws of your country or a country in the global marketplace. Legislation is important in identifying the rules and ethics that govern an organization, referring back to chapter 6 we can see how basic formats of ethics codes within organizations get their ideas from the legislation passed in a countries history. This presents an interdisciplinary look on how political and legal actions have an effect on us as leaders and managers within learning organizations.

Review Question:

1. What are three key legislative documents (in Canada, United States, and European Union) which help promote diversity within the workplace?
2. Why is it important to know about legislation in a learning organization?

11.3 Respecting the Rights of All

The goal with workplace diversity is that all members can work cohesively together, and with the knowledge of legislation that has been passed, respecting the rights of all in the workplace is a common approach to organizations. However, within the workplace there is an adjustment or a caveat that acts as a checks and balance on the side of the organization referred to as reasonable accommodation. **Reasonable accommodation** in one way means the employer must make a wholesome attempt to allow for differences amongst the workforce[10]. Another way it can be viewed is making accommodations in the workforce based on proven need or acceptable measure (i.e. a form in some instances). The United Nations in their Convention on the Rights of Persons with Disabilities describes reasonable accommodation as:

> "[N]ecessary and appropriate modification and adjustments not imposing a disproportionate or undue burden, where needed in a particular case, to ensure persons with disabilities the enjoyment or exercise on an equal basis with others of all human rights and fundamental freedoms"[11]

We will now focus on some areas where accommodation and reasonable accommodation can be found and used within an organizational setting. Furthermore, discuss some challenges within the workplace that can be presented in the workplace that can be remedied by reasonable accommodation and the legislation passed.

People with Disabilities

Within Canada, the meeting of needs for persons with a disability is noted in section 17 of *Canadian Human Rights Act* and asks that needs for a disability go through an approval process, once the process is approved the request to accommodate disability is put in action[11]. Essentially this follows the reasonable accommodation standard, if the request based on the *Canadian Human Rights Act* is deemed to be approved it will be approved. For example if there is a building on a premises that has no wheelchair accessibility, someone could send in a request to the Canadian Human Rights Commission, which then, if the commission deems that the building must accommodate wheelchair access, the building must comply under the legislation.

This can get tricky if it is a request that is deemed not sufficient or unapproved by the Canadian Human Rights Commission. This presents a challenging contrast as the person with disability needs a particular service, but the law deems it unnecessary, which a contrarian or devil's advocate would say the *Canadian Human Rights Act* of respecting all is unconstitutional.

Regardless of the legislation attached most instances (such as the example provided in paragraph one) are acceptable requests to the Canadian Human Rights Commission and fall under the action of reasonable accommodation. As a leader within an organization the role you could take on is if you see something within your premises or someone approaches you with an issue about their own or someone else's disability, the best action is to refer to a your legal team, refer to your code of ethics, or recommend this process to a higher level in the organization for action. As leaders we want to ensure all disabilities are accommodated and issues pertaining to disabilities resolved, therefore concise and consistent steps must be taken to ensure success.

People with Diverse Religious Practices

In our modern and global workforce, a leader or manager must manage different religions and beliefs within an organization. The concept of religion within an organization relates to the holidays an organization, state or society observe. Within Canada most organizations, follow the public holidays outlined by the federal government. The Government of Canada has outlined 10 public holidays, they are as follows[12]:

Image: Julian Paparella, Canada: A beacon of multiculturalism and welcome for the world. Link: https://saltandlighttv.org/blogfeed/getpost.php?id=76464

- New Year's Day – January 1st
- Good Friday – Friday, mid to late April
- Victoria Day – Monday, late May
- Canada Day – July 1st
- Civic Holiday – Monday, early August
- Labour Day – Monday, early September
- Thanksgiving Day – Monday, mid-October
- Remembrance Day – November 11th
- Christmas Day – December 25th
- Boxing Day – December 26th

Now you can see this list outlines the general holidays such as Christmas and Good Friday, but what about other days of observance such as Ramadan and Eid al-Fitr for the Muslim faith; Passover, Rosh Hashanah, and Chanukah for people of Jewish faith; or Kawanzaa for members of the African Diaspora. Easter Monday is an observed holiday in Canada, but only in a few provinces and territories, and what about holidays and traditions practiced by our indigenous people of Canada? As a leader, your actions in exercising reasonable accommodation are paramount; although your position in an organization may not change the laws on holidays for time off, you can be instrumental in acknowledging and accepting adjustments to the rule. Allowing organizational amendments for different traditions can be done by allowing a couple hours away from work to worship, extend dress and uniform requirements, provide prayer and meditation rooms, and be accommodating to dietary issues[13]. These actions will provide you with the ability to effectively manage diversity and accommodate all different faiths within an organization.

People with a Different Race, Gender, and Sexual Orientation

Within organizations in Canada, we have an anti-discrimination measure as noted in the aforementioned Human Rights Act that prohibits discrimination based on race, gender, and sexual orientation. Inside the workplace the same rules apply especially when discussing wages in the workplace. Section 11 of the Canadian Human Rights Act states that "It is discriminatory practice for an employer to establish or maintain differences in wages between male and female employees employed in the same establishment who are performing work of equal value"[14]. Although it does not explicitly mention race in this section the implication is that regardless of race male or female, you are to be paid the same.

In our modern landscape, people have many different genders that don't align with their sexual orientation. It may be more of a process as although not explicitly stated, gender protection falls under the general purpose of the act.

How do we manage this aspect as leaders? Well it will be important to really know your organizational members and being reasonable with requests. If someone, would like to be called a different name or alternate name in substitution of their given name that can be seen as reasonable. However, some instances may not be seen as reasonable, and a civil discussion and consensus must be reached. There are many goals within an organization that need to be reached by all different members, and it is best to resolve any conflicts based on race, sex, and gender efficiently and effectively for both parties to return to a cohesive unit. If issues cannot be resolved, consulting the code of ethics, and the Canadian Human Rights Commission may be necessary to mediate the issue.

Discrimination

With all of these practices in place, we still hear stories of discrimination in the workplace. From disability discrimination, race discrimination, sexual discrimination, and gender discrimination even in this modern era, organizations can experience issues with these aspects. Noted, in the 21st century discrimination has been lowered compared to recent decades, but how do we effectively prepare ourselves as leaders to be proactive in eliminating discrimination. We have outlined some steps to help notice and proactively remedy discrimination in the workplace:

1. **Know the signs** – Be proactive in knowing the signs of discrimination in the workplace, even if it may seem harmless, intervene and take appropriate action.
2. **Consult your organizations code of ethics** – Refer to the code of ethics for an organization, and understand how a discriminatory act hurts the individual and the mission, vision and values you set out for your organization.
3. **Engage in civil discourse** – If different parties are involved engage the parties to discuss the issue and mediate the

circumstances in a calm and civil manner.

4. **Use expert power (but only when needed)** – Within a civil discourse it is better to use *active listening* over anything else, but do intervene when a situation calls to use expertise to guide towards a conclusion.
5. **Consult a human rights commission** – Either municipal, province/state, or federal. If a situation needs to be delegated to a human rights commission, don't avoid it, take action. Ideally you would like to avoid getting to this point, but if it's necessary, it can protect you and the organization in the long run.
6. **Always follow up on issues of discrimination** – Even after the event has passed and in some cases tempers cooled, it is always best to have a follow up on the situation to ensure measures that were implemented are working and members are pleased with the results. If members are still not pleased, you may need to consult again and engage in more discourse. By actively following up on issues, this shows members on both sides of the discussion that you care about the issue and want to effectively manage to an agreeable conclusion.

An interactive or media element has been excluded from this version of the text. You can view it online here: https://ecampusontario.pressbooks.pub/educationleadershipmanagement/?p=415

11.4 Team Diversity and Multicultural Teams

When we discuss teamwork and collaboration, we refer back to chapter nine when we discussed teamwork within organizations and the use of cooperative learning within learning organizations. Moving further what are some thoughts on diversity and multicultural teams within an organizational structure? Rock and Grant support the idea of multicultural and diverse teams and is key for the boosting of intellectual potential, helping to keep biases and assumptions in check[15]. When reflecting on aspects of indigenous pedagogy, the idea of the respect for group processes and a sense of community is important to fostering knowledge within indigenous communities.

One important aspect that relates to working within multicultural teams is the communication aspect that is present in all teams. We discussed the forms of communication and how communication is used in a collaborative nature; however, multicultural teams can find challenges within one cultures difference to another cultures communication process. Some cultures use **direct communication** which is essentially the use of communication tools through the direct words they use with literal interpretations[16], other cultures use **indirect communication** which is the use of non-verbal behaviours and implications to convey meaning within the communication process[16]. Here is a general outline of the differences between cultures with direct and indirect forms of communication, and examples of some cultures that are both direct and indirect communicators.

Direct Cultures	Indirect Cultures
• Considered to be low-context. • Succinct and accurate verbal speak. • Be truthful in any situation (speak your mind). • Cultures include: **Canadian, American, British, and Australian**.	• Considered to be high-context. • Elaborate and descriptive actions of non-verbal communication. • Best to be polite than to be truthful. • Cultures include: **Russians, Italians, Brazilians, and African Nations**.

With this understanding of different ways cultures communicate within a workforce and how it can present challenges, it also presents a very important opportunity to check biases and assumptions of an individual or a group where different cultures are amalgamated. Rock and Grant outline a study done by the *Journal of Personality and Social Psychology* which concludes that groups from diverse background completed a task with greater efficiency and with less errors compared to the homogeneous group[17]. They also cited a study in Texas where diverse teams were able to accurately price stocks more correctly than homogeneous groups[17]. Although the methodology and data collection were not stated, the conclusions found that when errors occurred in deliberation that members of diverse groups worked more efficiently to remedy the situation[17].

This might have to do when diverse groups get together and traditional norms are cast aside, one of the traditional norms within any society can be *confirmation bias.* As discussed in chapter 8, distinctions in cultural world-view can be beneficial to the success of an organization. Perhaps the diverse group moved away from confirmation bias and engaged in a wholesome discussion, leading to a more successful outcome. With teamwork, it is important to remember the core tenants of what makes a good team and add in the understanding of a multicultural and diverse dynamic. It only leads to a richness within an organization and progress towards goals, or in the case of learning organizations, increases learning richness and progress towards mastery.

Review Questions:

1. Define direct and indirect communication?
2. What are some cultures that engage in direct communication? Indirect communication?
3. What is a potential outcome when cultures do not cast aside traditional outcomes?

11.5 Leadership in a Modern and Diverse Society

As mentioned in previous chapters, the need for effective leadership in a modern and diverse society is imperative in this 21st century, globalized environment. Within this framework we discuss the concept of cultural and global diversity within the framework of organizations, and how as leaders we need to be cognizant of the ever-changing diverse landscape.

Within culture and global diversity we refer to the idea of cultural intelligence. **Cultural intelligence** is a competency that allows individuals from cultures to function effectively in other cultural environments[18]. Essentially cultural intelligence is the ability to be aware of other cultures and their impact on your own culture, in addition being *self-aware (Maslow)* about your own culture and the impact on other cultures. Here are some stages one might face when adapting into a new culture:

- Confusion
- Small Victories
- The Honeymoon
- The Irritation and Anger
- Reality

With these steps confusion is a given, since your life up to this point has been one view, and gaining small victories can be understanding basic language and maybe forging a few relationships. At this point you feel like you have been accepted by the culture, then you realize this is only the tip of the iceberg as learning a language and forging relationships doesn't develop your understanding of the social, political and economic factors of a culture. This leads to frustration and eventually to a reality of knowing a culture and the pros and cons associated with that culture. Understanding cultural intelligence in this way develops an understanding the impact of you in that culture and self-reflecting on your own culture inside of a new culture.

This leads to a question if management and leadership theories are universal? Geert Hofstede would say there is no universal theory to management and that management theories closely relate to a particular culture[19]. We can see even from the leadership and management theories presented in the early chapters, coming from a North American perspective, seem to follow the American economic model from the early 20th century, and American principles on economy and business. When understanding how different cultures interact with leadership ideals we use the culture insights research from Project GLOBE. House, Hanges, Javidan, Dorfman, and Gupta developed the GLOBE study of 62 countries and how each culture reacts to leadership traits, organizational values and relationship along cross-cultural lines[20]. Figure 2 outlines the results of different cultures and how they relate to the different traits.

	Low-Score Clusters	Mid-Score Clusters	High-Score Clusters
Power Distance	Nordic Europe	Sub-Saharan Africa	-
Uncertainty Avoidance	Latin America	Southern Asia	Germanic Europe
Gender Egalitarianism	Middle East	Anglo	Eastern Europe
Future Orientation	Eastern Europe	Latin Europe	Nordic Europe
Institutional Collectivism	Latin America	Anglo	Confucian Asia
In-Group Collectivism	Anglo	Latin Europe	Middle East
Assertiveness	Nordic Europe	Confucian Asia	Germanic Europe
Performance Orientation	Eastern Europe	Southern Asia	Confucian Asia
Humane Orientation	Germanic Europe	Middle East	Sub-Saharan Africa

Figure 2: Culture Insights from Project GLOBE. *(Source: Robert J. House, Paul J. Hanges, Mansour Javidan, Peter W. Dorfman, and Vipin Gupta. Culture, Leadership and Organizations: The GLOBE Study of 62 Societies, 2004)*

Activity: Disputation (Debate):

Woodcut carved by Johann von Armssheim (1483). Portrays a disputation between Christian and Jewish scholars (Soncino Blaetter, Berlin, 1929. Jerusalem, B. M. Ansbacher Collection). This work is in the ***public domain*** *in its country of origin and other countries and areas where the copyright term is the author's* ***life plus 100 years or fewer****. From https://commons.wikimedia.org/wiki/File:Disputation.jpg*

Disputations (Latin: Disputatio) are formalized debates that were common in the Middle Ages and are designed to establish a truth between two competing sides in the realm of philosophy, theology, and the sciences.

In this activity three teams will be formed, one team will take the side of pro (agree with the proposed resolution), and the the other team will be contra (disagree with the proposed resolution) and the third team will be the magistrate (judging the outcome). Regardless of your personal feelings on the topic, a good debator is able to construct an argument from both sides, this makes one valuable for creating a rebuttal for both sides.

Disputation:

Fellow orators and debators let it be resolved: diversity in organizations is a perfect solution to organizational effectiveness.

– Pro and Contra teams will have five minutes to shape their argument.

– After the five minutes the Pro team will make their case no longer than five minutes

– After the Pro team, the Contra team will make their case.

– Pro will be allowed a 2 minute rebuttal to the Contra case (be sure to take notes while the other team is talking).

– Contra will make a final 2 minute rebuttal to conclude the disputation.

– Magistrate are to listen and collectively come up with a winner on the debate. Keep in mind the ethics, logic and persuasion of the Pro and Contra teams.

Conclusion

We can really learn from the concept of diversity and multiculturalism to understand learning within learning organizations. When we attempt to foster learning either through leadership techniques, management techniques, social entrepreneurship, ethical considerations, decision-making, teamwork or communication; it is important to keep a diverse mindset, and understand where you place yourself in a diverse culture, and to be self-aware of where a culture places you. This chapter acted as a reminder of our journey as we near the end of leadership and management within a learning organization, and provides a reminder of large issues that are imperative to being successful leaders in a modern and diverse environment.

A review of this chapter's major conclusions, include:

1. Diversity is the identity-based differences between people, diversity concepts within organizations are workplace diversity and managing diversity.
2. Canada passed the *Canadian Human Rights Act* (R. S. C., 1985, c. H-6) which allows individuals to pursue a life they desire without restrictions based on race, gender, sexual orientation, ability, religion and others. Other countries have similar legislation.
3. Using the concept of reasonable accommodation and understanding the steps to acknowledge, delegate, and remedy situations or discrimination in the workplace.
4. Understanding diversity and cultures through direct and indirect communication can help shape the learning process within different individuals to progress towards mastery.
5. The use of cultural intelligence will be beneficial to

understanding cultures in a globalized marketplace, more succinctly being self-aware of your standing inside your culture and other cultures.

On this journey we have developed a holistic understanding about leadership and management and its impact not only on yourself or learners you are developing, but its impact on a global scale and in different cultural communities. Please reflect on this chapter as the impact of learning and the fostering of learning as a leader is an important role to take away as you move on into the real world. Once ready advance to the twelfth and final chapter where we revive aspects of the leadership and management and discuss if there is truly a different between the two?

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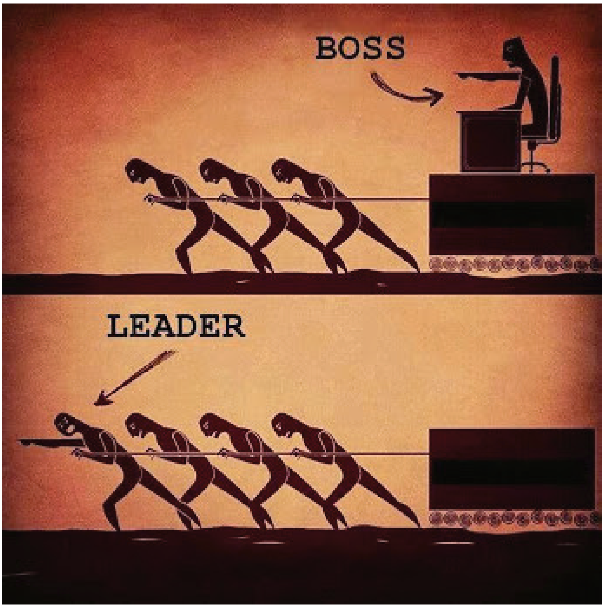
PART XII

CHAPTER 12: LEADERSHIP AND MANAGEMENT REDUX



Along this journey what are some specific characteristics that separate a leader from a manager? Is it as clear cut as we make it out to be?

We have reached the final stage in our leadership and management journey, this chapter will act as a restoration or a redux of leadership and management. We will bring back our ideas from the beginning of our journey to this point as a reflection. John Dewey says that reflection at its core is the combining of observation and memory, and to actively recall what happened in the past[1]. This chapter will attempt to bring back your previous ideas of leadership and management and converge them with your current ideas of leadership and management.

The learning outcomes for this chapter are:

1. Contextualize how the historical understanding of leadership and management affects the future of leadership and management.
2. Define the achievement of organizational culture in a learning organization
3. Is there a difference between leadership and management? Develop and critique a complete definition of leadership and management.

Chapter Tips:

- Use previous chapters of the text to make an understanding of leadership and management at this final stage.
- Use your map from Chapter 1 for reference.
- Develop your own conclusion on leadership and management.

12.1 Leadership and Management: Past and Future

The great French revolutionary Napoleon Bonaparte once said that “A leader is a dealer in hope”[2]. When looking into the past about the understanding of leadership we can trace concepts all the way back to the age of Antiquity, Roman Empire, Renaissance, and the Age of Enlightenment to find small pieces of understanding about the ideas of leadership.

Plato and Aristotle – School of Athens.
(Attribution: Raphael 1509, This work is in the public domain in its country of origin and other countries and areas where the copyright term is the author's life plus 100 years or fewer. Retrieved from https://commons.wikimedia.org/wiki/File:Sanzio_01_Plato_Aristotle.jpg)

Aristotle

In the *Nicomachean Ethics*, Aristotle claims that through practical wisdom one sees truth, and one who deliberates their practical wisdom effectively is the basis for acting good[3]. This resonates that the idea of pursuing wisdom to see truth leads to a virtuous deed. This follows the idea of a leader inside of a learning organization, as leaders or managers, you should not feel you have to lead but that you want to lead, and that you want to use knowledge that builds towards truth creating good in society. Aristotle states: “The happy life is thought to be virtuous; now a virtuous life requires exertion”[3], Michael Nelson sees this quote as the idea that happiness is not for the fun but for satisfaction and accomplishment, concluding that successful leaders are happy and content which make them effective leaders[4]. When we look at a learning organization such as a school, for the most part educators are there because they enjoy knowledge, learning, and passing the learning on to prospective learners. It is that lineage of knowledge that truly makes leaders in learning organizations happy and virtuous.

Francis Bacon, Viscount St. Alban *(Attribution: John Vanderbank, 1731?, after a portrait by an unknown artist (circa 1618), Public domain works must be out of copyright in both the United States and in the source country of the work in order to be hosted on the Commons. If the work is not a U.S. work, the file must have an additional copyright tag indicating the copyright status in the source country. Retrieved from https://commons.wikimedia.org/wiki/Francis_Bacon#/media/File:Francis_Bacon,_Viscount_St_Alban_from_NPG_(2).jpg)*

Francis Bacon

In the famous authors work *The Essays* first published in 1601, Bacon writes on a host of different topics from society, to science, to education, to love and mischief. In his discussion about honour and reputation he discusses that envy is the detriment to honour, and that the individuals including past Roman and English kings as great leaders of the battlefield; due to the sacrifices they made for the country over themselves[5]. This takes virtue one step further, explaining that leadership is a selfless act. To be a leader and to truly lead another individual or group, you have to take something away from yourself to help another. Have it be time, effort, or physical ability, you must be willing to commit a sacrifice for the greater good. To foster learning as a leader in an organization, you must be willing to sacrifice your time, effort, ideals, and convictions on the hope that learning is fostered. This relates to the Napoleon quote as leadership and management in a learning organization or any other organization is requires a sacrifice for the good and a sense of positive hope for the people within a society.

From Past to Future

So what does the past tell us about leadership now and in the future? First it tells us that a leader must be ethically sound and enjoy their art, in addition, a leader must be willing to sacrifice comforts to achieve goals and objectives. This relates to the idea of a leader managing for specific outcomes that are morally sound and attempt to achieve goals outside the comfort realm. Sigler outlines three outcomes of managers within organizations and what is needed to achieve success[6]:

- Moving from process and activities to results
- A change in paradigms for learning organizations
- Leader as a catalyst – pushing the organization to further point than previous for growth.

Leaders are to foster growth, much like a leader in a learning organization is to foster growth in learning; this means moving beyond actions, showing results, and reflecting on past activities to show the learning that occurred in the activity.

With a shift in paradigms towards a reflective focus, the leader becomes the great motivator to push the organization further through their will, determination and sacrifice for the good of individual, team, and organizational growth.

Looking into the future, we see that leadership and management will require the same tenants of the past but with an action that understands the world and what drives the world in a modern age. This action is called **innovation** which is the advancement or 'newness' in development of processes or products within an organization[7]. Innovation within learning organizations such as a school setting focuses more on the processes of divergent methods with teaching in schools, embracing and enhancing technological classrooms, and re-framing the focus of a learning institution to be more reflective and actionable. These processes relate to **management of innovation** which includes change in management and managing processes that enhance innovation[7]. Figure 1 shows a list of the 5 C's of management innovation:

The 5 C's

1. Casting a Wide Net
2. Creating Newness
3. Creating Culture
4. Communicating Knowledge
5. Changing with Courage.

Figure 1: Innovation Management. *(Source: Copyright Rice University, OpenStax, under CC-BY 4.0 license)*

Review Questions:

1. What outcomes does Sigler outline that managers need to achieve success in an organization?
2. What is the definition of innovation?
3. What are the five C's of innovation management?

12.2 Achievement of Organizational Culture in a Learning Organization

How do we define achievement in a learning organization? At this point, one aspect you might say is that learners achieve their goals with learning objectives over an amount of time. However, let's take a more applied approach in the different processes that might be needed to achieve organizational success. Here is a list of different processes of organizational culture that have an impact on the future of learning organizations:

- Hiring Philosophy
- Institutional Policies
- Budgeting Process
- Rewards
- Decision-Making Style

Hiring philosophy in many ways is how you, as a leader or manager align yourself in how to hire individuals. For example, when you see a resume of an individual, does their ability to be proficient in Microsoft Office offer an advantage to job prospect, or do you see it as an expectation in the modern age of computer and tech, and that space on a resume can be substituted by a more advanced skill? Do you feel a cover letter is important? Do you see attaching an application form to a resume redundant? These can have a factor in how you effectively recruit and hire members in your organization, this leads to **institutional policies** of how directives of government and society affect the direction of a learning organization. Will a learning organization guide all of their programs with a divergent method or take on a previous method? This can all depend on internal factors (i.e. change in upper management) or external factors (i.e. change in government and legislation) to influence how institutional policies will be shaped.

Budgeting process is how learning organizations will budget programs within their walls. The challenge with this process is that since the 2008 recession, most nations have bounced back financially, but are more fiscally aware and have not left a savings-model. The classic corporate philosophy of *maximize productivity + minimize wage = maximal profit* seems to be a trend in some learning organizations, and we must understand this trend and not let the goal of learning fall to the wayside. Therefore, a more learning focused budget on using funds to enhance learning will be render a more *utilitarian* outcome as outcomes will be dispersed through the organization and community, as opposed to strict saving which benefits only a few.

Rewards mean thoughtful rewards in a twenty-first-century framework. How will we reward learners in a modern society? First thing, we must acknowledge the growing loss of work due to external factors such as technology, and a growing population. Rewards in a modern sense means tailoring learning authentically and experientially to help a learner gain further workplace and societal skills, and profit financially from their achievement of learning outcomes. Of course one should not forget as a leader that passion and care should be paramount, rewards still play a significant factor which leads to the decisions made by leaders affecting these processes. **Decision-making styles** follows what we discussed in chapter 8, and applies it to managing achievement for the future of a learning organization. Effectively being able to share important ideas and processes for success will be paramount in how we impact future learning organizations.

We refer back to Peter Senge and his prediction of learning organizations in which he outlines a social responsibility of organizations to lead and manage effectively in the areas of diversity, and environmental responsibility[8]; he points out a focused understanding and deep habits of through as opposed to a quick-fix both economically and philosophically[8]. This relates to the idea of not just listing the processes but using the processes effectively and efficiently to lead, manage and guide the learning organization into the future.

Review Questions:

1. What are the different processes of organizational culture that have an impact on learning organizations?
2. What does Senge outline as his prediction of the learning organization?

12.3 Is There a Difference between Management and Leadership? (The Redux)

As previously stated, a redux can be a restoration of a particular idea or concept. So let's restore our ideas of leadership and management. In chapters 1 through 3 we discussed leadership and management, and what others defined leadership and management to be.

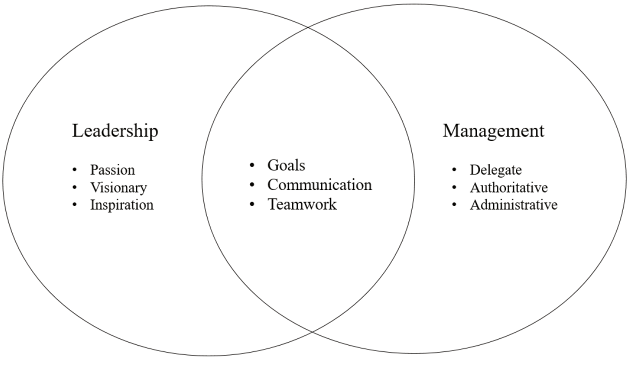


Figure 6 (From Chapter 1) Separate and Similar Descriptors of Leadership and Management

Looking at this section do you feel leadership and management follow this Venn diagram ideal of leadership and management can be both similar and dissimilar? Or do you feel leadership and management are their own ideals. Both ideals have differences but are both needed to be an effective member within an organization. We described management as the planning, organizing, directing, and controlling the systems of an organization; however, to get to managing stage of an organization, it must start through a sort of social influence, an idea or a relationship between individuals that start at the onset of a project or organization. Sometimes this influence starts even before you enter an organization or workforce; it may be a world view or specific philosophy you develop either naturally or through social influence.

One way to look at leadership and management is an iceberg, in many ways this can relate to **Edward T. Hall's Cultural Iceberg Model** which follows our behavior, and external beliefs (the top of the iceberg, seen) are supported by values, thought patterns, and internal beliefs (below the surface, unseen)[9]. To an onlooker of an organization the iceberg model can apply; we can see and observe systems in place within an organization, and we know that a specific mission, vision, and value is supporting the management, but we cannot tangibly observe a relationship, social influence, or phenomena. Figure 2 shows the model of leadership and management using the iceberg model.

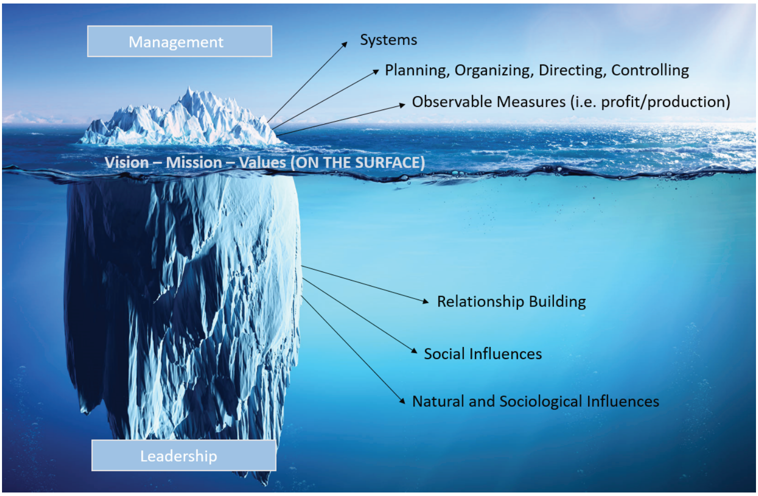


Figure 2: The Iceberg of Leadership and Management *(Image from: Continuity SA: https://www.continuitysa.com/beware-iceberg-business-continuity-important-not-outsource/)*

It's not only what is seen within the organization, it's what is not seen that can be a catalyst for creating a successful organization. Within the realm of the learning organization we find that through effective leadership and management, proper communication channels, ethics, learning theories, job design, decision-making and teamwork all relate to Peter Senge's five disciplines[10]:

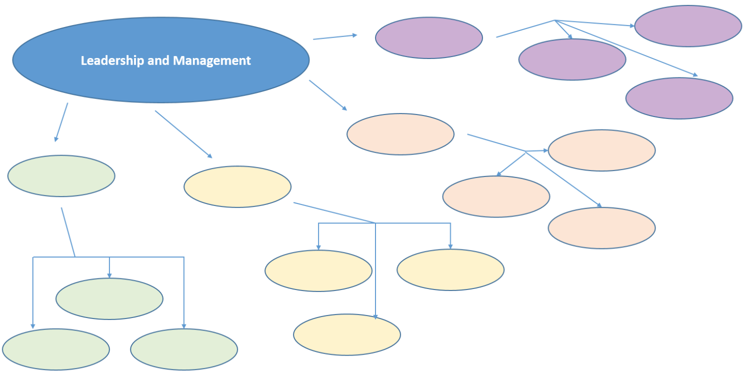
- **Personal Mastery** – Building your leadership ability through scaffolding
- **Mental Models** – Natural and sociological influences
- **Building a Shared Vision** – Collaborative and communicative approach to the future
- **Team Learning** – Using communication, decision-making, and collaboration to develop a collective ideal and avoid group-think.
- **Systems Learning** – Building up the iceberg moving from

leadership to mission, vision, and values and using all of those factors to run learning systems in your organization.

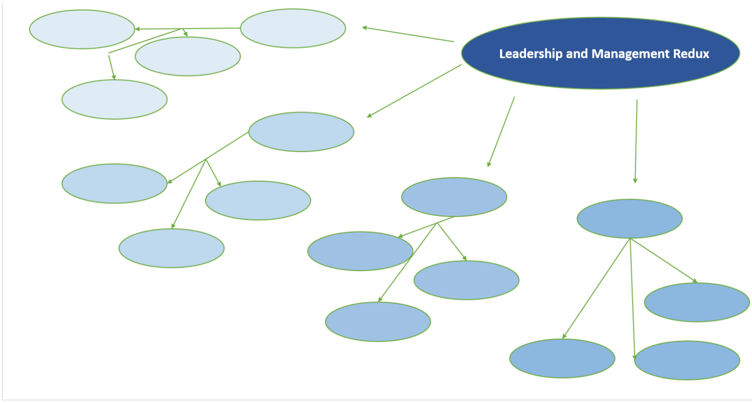
Moving forward in your future management and leadership endeavours, the most important takeaway is that an iceberg is not an iceberg without it's above the surface and below the surface. Much like an organization is nothing without the characteristics of leadership and management, and yes one part of the iceberg is visible while the other is invisible, but they complement each other, much like leadership and management on the surface can be different but they complement each other and work towards the same goals within a learning organization.

Activity: Leadership Map Before and After

Step 1: Use your Leadership and Management Map in Chapter 1.4 from earlier



Step 2: Using the information that you know now, develop a new, restructure, or keep the same Map from Chapter 1.4 into a new map below



Questions to Consider

- Did anything change from your initial assessment of leadership and management?
- If so, how do you see leadership and management within a learning organization?
- Do you feel further learning can be achieved in this realm? How would you achieve it?

Conclusion

In summation, the role of leadership and management can work in different capacities, yet be the same when developing an organization. Leadership is nothing if it doesn't build a systems based management structure, and management would have no support without the work of leadership being the backbone of ideals.

A review of this chapter's major conclusions, include:

1. Being ethically sound and sacrificing comforts for goals and objectives (classical ideals) lead to one drive to innovate and make better for society (contemporary ideals).
2. Developing and systematically organizing hiring philosophies, institutional policies, budgeting processes, rewards, and decision-making styles are effective measures for managing organizations into the future.
3. Leadership and Management are both the same and different. Using the iceberg analogy and the five disciplines, leadership and management are both independent and dependent from each other. Especially when achieving goals in a learning organization.

To offer parting words after this journey, it is important to understand that whatever leadership or management style you choose it has to relate to your inherent beliefs. Essentially the iceberg below the surface is not just made one day, it is shaped and cultivated throughout life through natural and social occurrences, assumptions, and inherent beliefs. It is very important to find your own iceberg and self-reflect on what your beliefs mean to your own leadership and how you develop your management style. As prospective leaders and managers in society, it is highly important to locate yourself and cultivate that leadership style to become successful in a future society.

Unit 4 Reflection

An interactive or media element has been excluded from this version of the text. You can view it online here: https://ecampusontario.pressbooks.pub/educationleadershipmanagement/?p=805

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This is where you can add appendices or other back matter.

Glossary

Active Listening: Transmitting the message from the sender, and taking action to help someone say what they actually mean.

Autocratic Leaders: Directive leaders, allow little input or discussion from subordinates.

Behavioural Management Theory: A theory developed by Chester Barnhard uses the concepts that approaches to the workplace should be in the interest of company and worker. Workers are viewed as psychological and social beings.

Boundary Dynamic: A delicate boundary between strategy, stakeholder management, and organizational management.

Bounded Rationality: The notion that challenging of complex issues that we as leaders cannot fully grasp, we are unable to be rational about the situation and be incapable of understanding an alternative

Brainstorming: The generating of a variety of solutions or possible outcomes for an effective decision.

Broadcast Media Transmission: Follows a one-to-many approach (i.e. a newscast).

Bureaucratic Theory: A theory developed by Max Weber explains the formal hierarchy in organizations in which tasks are delegated.

Business Ethics: An applied ethic; focuses on real-world situations in the environment where transactions occur.

Canadian Human Rights Act: A Canadian federal act passed in 1985 which requires all individuals have the opportunity to pursue life and work without being discriminated against an individual's race, religion, age, sex, sexual orientation, gender identity, marital status and others.

Charisma: Compelling interest or charm.

Charismatic Leadership: A leader who uses charisma to influence members within an organization to bring about change.

Checks and Balances: Within an education context; it is when the students check and balance the outlines from the professor, and the professor checks and balances the expectations of the students.

Civil Rights Act: A federal act passed in the United States in 1964 which proposes the prohibition of discrimination in public places (i.e. schools, government building etc.).

Classic Entrepreneur: Inherent drive to start a business based on an original idea.

Code of Ethics: A piece of organizational legislature that provides employees with the knowledge and expectations, responsibilities, and behaviours towards fellow employees, customers and suppliers.

Coercive Power: A leader who uses negative outcomes to garner results.

Cognitivism: The belief of identifying the mental process; internal and conscious representations of the world.

Communication Process: When a communicator encodes a message and receiver decodes a message

Communication Richness: How effective and holistic the communication media is depending on the communication tool used.

Communication: The act of relaying messages either verbal or non-verbal from one person or entity to another person or entity through signs, symbols and syntactics.

Communicative Media Transmission: Follows a many-to-many approach (i.e. YouTube Live Stream).

Competing Values Framework (CVF): An awareness check for an organization in regards to corporate culture.

Confirmation Bias: The idea that our initial beliefs are given more attention and pay less attention to beliefs outside of our world view.

Connectivism: The belief that knowledge is created beyond the level of individuals, and that knowledge through a network of connections is continuously changing.

Consensual Leaders: Encourage discussion, requires parties to make final decisions.

Constructive Feedback: Ensuring feedback is useful and following up on the feedback to ensure the learner is progressing.

Constructivism: The belief that all knowledge is subjective in nature, constructed from reality, and mutually agreed upon in a consensus.

Consultative Leaders: Encourage discussion, leader retains final authority over decision.

Contingent Reinforcement: Used when desired behaviour is exhibited, relating to a team reaching a quarterly goal, or daily working within the mission, vision and values of an organization.

Corporate Culture: focuses on the values of an organization, and relates to the socio-environmental characteristics of an organization

Corporate Governance: Different relationships a manager will have within an organization.

Corporate Social Responsibility (CSR): A form of self-regulation where firms take action and make initiatives to help people and the environment.

Cross-Functional Teams: Members within different groups who work together on a project

Cultural Iceberg Model: Developed by Edward T. Hall, follows our behavior, and external beliefs (the top of the iceberg, seen) are supported by values, thought patterns, and internal beliefs (below the surface, unseen).

Cultural Intelligence: A competency that allows individuals from cultures to function effectively in other cultural environments

Decision-Making: The action of thinking through a process and coming to a consensus either personal, or collaborative, and following through with that action

Decoding: During the communication process the receiver accepts the encoded message as an interpretation.

Delegating: The use of other individuals in a collaborative nature to handle tasks that have initially been brought to yourself

Democratic Leaders: A leadership style that embraces input from all members and puts decisions to a vote.

Deontology: An ethical concept that ethical individuals will meet their duties as it is obligated by society.

Departmentalization: Different structures within an organization maintaining control of their specific structure.

Devil's Advocate: Provides an alternate view or a challenge to an individual's logic on a decision.

Direct Communication: The use of communication tools through the direct words they use with literal interpretations

Direct Report: A member within an organization who is directly higher than a particular individual (i.e. the owner is the direct report of the CEO).

Discrimination: The unjust treatment of different categories of people or culture.

Diversity: The identity-based differences between people

Division of Labour: The breakdown of work into well-defined tasks made to be manageable.

Dynamic Forces: The different forces that can affect organizations in a global marketplace (*economic, legal-political, technological, socio-cultural, and natural*).

Economic Forces: forces that pertain to an organizations role within its national or global economy

Educational Policy: Creation, implementation, and revision of educational factors such as class size, teacher education, teaching methods, and curriculum.

Effective Communication: When a manager tells an employee something using jargon or colloquialisms, the employee understands completely and carries out a task.

Electronic Grapevine: the grouping of different electronic mediums connecting organizational members in many different ways.

Emotional Intelligence: Goleman's definition is the ability to "manage ourselves and our relationships effectively".

Entrepreneur: Classified as someone with vision, drive, creativity, and are committed to taking on risk to start a business for profit.

Entrepreneurial Culture: A mixture of personality and management identified by those who create not only businesses, but the culture that surrounds it.

Epistemology: Hofer and Pintrich say it is the philosophy on the justification or nature of knowledge.

Equity Theory: Organizational learning theory developed by J. Stacy Adams, based on the logic of social comparisons of the notion that perceived inequality is a motivating state, and people have different preferences to equity.

Escalation of Commitment: The idea that leaders and managers remain committed to a poor decision, or find it hard to remove ourselves from a poor decision rationally

Ethical Leadership: The enacting of ethical values central to organizational alignment.

Ethics Self-Governance: The performance standards requiring high ethical standards and social responsibility.

Ethics: A code of moral principles that set the standard of good and bad, right and wrong.

Expectancy Theory: Organizational learning theory developed by Victor Vroom, based that motivation comes from three separate factors: *expectancy, instrumentality, valence*.

Experiential Learning: Coined by John Dewey, and perfected by David Kolb eluding to empirical experience playing a role in the learning process.

Expert Power: A leader's ability to have extensive knowledge in one or more areas within an organization.

Formal Organization: A set or relationships and responsibilities set from upper management to subordinates.

Formal Teams: Facilitate formal learning which the goal of personal development is the most important aspect.

Globalization: The phenomena that organizations move out of a local or national influence and expand to have a global influence.

Goals: An organizations general aims as expressed in public statements.

Goal-Setting Theory: Organizational learning theory developed by Edwin Locke, based on the idea of the theory is that goals can be motivating if they are properly set (planning) and well managed (execution) through four outlines: Direction, clarity of expectations, reference for feedback, and foundation for self-management.

Group-think: When one person uses their power in a group process and individuals will remain silent not to disturb the peace (i.e. going along with what the individual thinks as a group).

Hawthorne Effect: The organizational phenomena that employees in a workplace work better and are generally happier when management is concerned by their welfare.

Human Relations Theory: A theory developed by Mary Parker Follet relates to humans having a more satisfying life through work, and that humans solve conflict through a process of democracy and conversation.

Human Rights: An ethical concept that the human race has the right to live, have freedom, and pursue happiness.

Hybrid Classrooms: A transmission approach to delivering course content either separately or with connection face-face and online

Hygiene Factors: The nature of a job that is unsatisfying.

Immediate Reinforcement: Positive feedback right after the action.

Indirect Communication: The use of non-verbal behaviours and implications to convey meaning within the communication process

Individual Needs: The concept of deficient psychological or physiological needs in an individual.

Influence: The ability to have an effect on a person, ability, or situation within an organizational structure.

Informal Organization: Run as a network of different individuals with evolving relationships

Informal Teams: Facilitate informal learning, the organizational task is the most important and the learning outcome is secondary.

Information and Communication Technology (ICT): Goal is to develop a sense of deep learning with students and educators through the use of technology (i.e. computers and internet).

Innovation: The advancement or 'newness' in development of processes or products within an organization

Inquiry-Based Learning: Where a leader can provide help, but the learner explores their own themes, develops actions and comes to conclusions.

Interdisciplinary: The combining of two different specializations and augmenting them into a process.

Interpersonal Communication: individuals who share ideas about the company's incentives and discuss their personal feelings to others within the organization.

Intrapreneur: Classified as someone who have freedom to develop new products and ideas under the guidance of their employer.

Job Design: Follows the fundamentals of scope, depth, and specialization of the job in relation to the job simplification, rotation, enlargement, and enrichment.

Job Enlargement: the increase of task variety by combining two or more tasks that were previously assigned to different workers

Job Enrichment: the practice of expanding job content through job depth to create more opportunities for satisfaction

Job Rotation: the increase in task variety by periodically shifting workers between jobs

Job Simplification: the standardizing of work procedures and employing people in well-defined and highly specialized tasks

Justice: An ethical concept of what is fair according to the prevailing standards of society.

Lassiez-Faire Leaders: A leadership style where leaders leave the control to their employees, so long as it confines within existing company ethics and standards.

Leadership Characteristics: Specific traits within one leadership style in which they plan projects and achieve goals.

Leadership: The social relationship between two or more persons who depend on each other to attain certain mutual goals in a group situation.

Learning Organization: An organization that fosters growth and learning, and continues growth into the future.

Legitimate Power: A leader who uses their heightened position within an organization as an influence.

Long-Term Memory: A passive approach through a series of data links retained in our minds.

Macropreneur: Business based off of an original idea, start small and grow to a major corporation, business is based on personal satisfaction and pursuing profit.

Management: The process of planning, organizing, directing, and controlling the activities of employees in combination with other resources to accomplish organizational objectives

Mechanistic Organization: Run as **top-down** hierarchies with *formal* rules and a narrow span of control.

Michigan Studies: Studies done at The University of Michigan which behavoiours are identified as **job-centered behaviours** and **employee/member-centered behaviours**.

Micropreneur: Business based off of an original idea, start small and stay small, business is based on personal satisfaction and lifestyle.

Motivation Needs: The ability to use action within an organization to account for the persistence to do work.

Multiculturalism: The process of ethnic pluralism within a state or society through legal, social, and economic factors.

Multipreneur: Classified as someone who starts a series of companies.

Nonverbal Communication: The transmission of communication without reading or writing

Normative Ethics: The field of ethics in relation to how one *ought* and *should* act.

Ohio State Studies: Studies done at The Ohio State University which developed the behavioural structures of **consideration** and **initiating structure**.

Online Collaborative Learning (OCL) : The model of learning in which learners are supported to work together, create knowledge, invent, innovate, and develop conceptual knowledge needed to solve problems, all while engaging in modern technology and developing through that technology collaboratively.

Oral Communication: The exchange of messages that are spoken and listened

Organic Organization: Run as a **flat span** of governance with *flexible* rules and participatory model of decision making.

Organization: A collection of people with a common purpose and aligned goals.

Participative Leaders: Shared leadership, allow input from individuals and brainstorm discussion about organizational issues.

Philanthropy: The helping or the donating of money to promote the welfare of the less-fortunate.

Planning: Creating an outline to guide operations in a direction of their mission, vision, and values.

Positive Reinforcement: The action taken upon by the leader to reward someone for doing good work.

Power: The ability to influence someone within an organization to get something you want done, completed.

Project-Based Learning: providing a student, in a classroom setting, a sense of responsibility and ownership in conducting projects with other students.

Reasonable Accommodation: In employment legislation, the employer must make a wholesome attempt to allow for differences amongst the workforce

Referent Power: A leader's ability to use charisma to garner admiration from peers.

Reward Power: A leader who gains influence through the use of rewards with an organization.

Satisfier Factors: The nature of a job that is satisfying.

Scientific Management Theory: A theory developed by Frederick Taylor helps to improve organizational task completion through scientific engineering and mathematical analysis.

Self-Awareness: The inherent knowledge of one's character, emotion, and motivations.

Self-Efficacy Theory: Organizational learning theory developed by Albert Bandura, based on the idea that an individual feels they are self-efficient or personally capable to performing a task.

Self-Managing Teams: Sets of teams with autonomy, and they are given authority as to how they go about their tasks.

Short-Term Memory: An active approach to learning in the moment

Small Businesses: Defined by certain characteristics such as: *physical space, economic annual revenue, and social makeup (i.e. number of employees).*

Social Entrepreneurship: Defined by J. Gregory Dees as adopting an organizational mission to create and sustain social value and pursuing new opportunities to serve that mission.

Socio-Cultural Forces: Forces pertaining to the values, beliefs, customs and traditions of different people in regards to race, religion, gender and other socio-cultural backgrounds

Stakeholders: The individuals or groups that are affected by the organization (i.e. employees, vendors, customers, and shareholders).

Strategic Giving: Ties philanthropy to the organizations corporate social responsibility (csr) of mission, vision, and values.

Subordinate: A member within an organization who is a lower rank than a particular individual (i.e. the CEO is a subordinate to the founder/owner).

Sustainability: Follows organizational practice of: Hiring local labour, creating new jobs, developing industry sectors, provide business and learning skills, help decrease the countries debt and improve standard of living.

Theory X: A theory developed by Douglas McGregor that managers believe subordinates dislike work, lack ambition, responsibility, and prefer to be led rather than lead.

Theory Y: A theory developed by Douglas McGregor that managers believe subordinates are willing to work, accept responsibility, and capable of self-control and self-direction.

Time Constraints: When there is little time available to collect information with rationality and make an effective decision.

Timeline: A given, set time to complete a task in order to be successful.

Transactional Leadership: A leadership style that changes styles, adjusts tasks, and allocates rewards to achieve a positive influence.

Transformational Leadership: A leadership style that heightens aspirations and shifts people and organizations to new levels.

Treaty of Amsterdam: European Union's basis for anti-discrimination law presented in 1997.

Triple-Bottom-Line: Three p's: *profit, people and planet*. Used to measure a level of organizational accountability towards ethical, social, and environmental causes.

Tuckman Stages of Group Development: Developed by Bruce Tuckman; describes the stages of *forming, storming, norming, performing, and adjourning* within organizational groups.

Utilitarianism: An ethical concept that people should act, and decisions should be made to reflect the *greater good* for the *greatest number of people*.

Virtual Teams: Described as cross-functional but are computer-orientated, rather than face-to-face interactions.

Visionary Leaders: A leader who heightens aspirations through emotional and intellectual attractions.

Whistle-Blower: An individual who exposes the unethical deeds of others in an organization, to preserve ethical standards and prevent against future unethical treatment.

Workplace Diversity: The identity-based differences of processes or outcomes within a work environment.

Written Communication: The use of emails, texts, reports and other annotations relayed from messenger to receiver for precise information.