

Leadership Research and Theory: A Functional Integration

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This historical overview of leadership theory and research with an eye for commonalities provides an opportunity for integration. Early unproductive research focused on personality traits and behaviors. A recognition of the more complex nature of the phenomenon resulted in the development of contingency theories that examined leader characteristics and behavior in the context of situational parameters. The 1970s brought an awareness that perceptions of leaders by followers and others, and perceptions of followers by leaders, were influenced by cognitive biases arising from prior expectations and information-processing schema. Ironically, attention was belatedly drawn to the study of female leaders, who were often the victim of cognitive biases and negative assumptions. Recent research has reflected on the role of cultural differences in leadership processes and has been drawn again into the search for outstanding leaders with universally effective characteristics. The article concludes with an integration of current knowledge in leadership effectiveness.

For much of its history, leadership theory and the empirical supporting research have been regarded as a fractured and confusing set of contradictory findings and assertions without coherence or interpretability. In this article I argue that a considerable commonality of well-accepted findings points the way toward a successful and useful integration of current knowledge. That integration, based on the key functions performed by effective leaders, begins to answer the question of how good leaders behave and raises intriguing questions about the personal characteristics of leaders that facilitate those behaviors.

This article takes an historical perspective, and the analysis is divided into four periods: (a) the period prior to the presentation of Fiedler's (1964) contingency model; (b) the period from 1965 to 1975, focusing on the development and elaboration of contingency theories; (c) the period from 1975 to 1985, when cognitive theories and concerns about gender differences arose; and (d) the period since 1985, which has most extensively focused on transformational theories and cultural influences. The historical analysis is followed by a presentation of an

integrative framework and a suggested direction for future research.

In this analysis *leadership* is defined as "a process of social influence in which one person is able to enlist the aid and support of others in the accomplishment of a common task." This definition places the subject distinctly within the purview of social psychology, and the analyses that follow reveal how fully the leadership literature is indebted to the field of social psychology for its dominant paradigms and central variables.

Before Contingency Theory: Lost in the Wilderness

Social philosophers have had a long-standing interest in both organizational and political leadership. Western European philosophers, embedded in a strongly individualistic cultural milieu, looked primarily to the characteristics of leaders for explanatory premises. For example, Carlyle (1841/1907) proposed the *great man theory* of leadership, which argued that successful leaders possessed traits of personality and character that set them apart from ordinary followers. The interest in individual characteristics of leaders was spurred by the emergence of intelligence tests in the early 20th century. Empirical psychology turned toward the study of traits, and the nascent leadership field followed suit.

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Traits

A sort of naive popularist psychology guided the choice of traits considered for leadership impact. Traits that were stereotypically associated with leadership, such as dominance, assertiveness, intelligence, physical stature, social sensitivity, and many others, became causal candidates. The typical research format for these early studies was to identify a group with leaders and followers and test for differences on the selected trait measures. Stogdill (1948) provided an extensive review of 30 years of the trait studies. He reported that a few traits (most notably intelligence) were sometimes associated with reliable differences between leaders and followers (i.e., about 35% of the time), but there was no single variable or even cluster of variables that was related to leadership across a variety of situations. Stogdill concluded that although individual differences were certainly important in identifying emergent or effective leaders, the great diversity of situations in which leaders functioned made it unlikely that any one trait would be a universal predictor. Although it was not immediately recognized, Stogdill's analysis set the stage for theories of leadership that were predicated on an interaction between leader traits and situational contingencies.

Behaviors and Styles

Daunted by the failure of traits to predict leadership, but unwilling to abandon individualistic explanations, researchers turned to the study of leader behavior. Observations of the effects of leadership style (i.e., autocratic vs. democratic) on the atmosphere of small groups (Lewin, Lippitt, & White, 1939), process analyses of interactions in laboratory discussion tasks (Bales & Slater, 1955), and reports of industrial workers on the behavioral styles of their supervisors (Kahn, 1951) sought to identify patterns of leader behavior associated with high productivity or good morale.

The most extensive of these research programs and the one with the most enduring impact on the field of leadership was the set of studies surrounding the development of the Leader Behavior Description Questionnaire (LBDQ) at Ohio State University (Hemphill, 1950). This 150-item behavioral inventory was used to collect ratings of military and industrial

leaders by supervisors, subordinates, and observers. Subsequent factor analyses revealed that a major portion of the variability in leader behavior could be explained by two major clusters (Halpin & Winer, 1957). The most prominent factor, labeled *Consideration*, included behaviors such as showing concern for the feelings of subordinates, making sure that minority viewpoints were considered in decision making, and attempting to reduce conflict in the work environment. These behaviors seemed to reflect leader intentions to support positive group morale and follower satisfaction. A strong second factor, labeled *Initiation of Structure*, included items measuring the leader's use of standard operating procedures, criticism of poor work, and emphasis on high levels of performance. These behaviors appeared to be related to a leader's focus on building a structure for task accomplishment.

Although the LBDQ factors were found reliably in ratings of leader behavior across a wide range of settings, they were less than completely successful at predicting the important outcomes associated with leadership effectiveness, that is, follower satisfaction and group performance (Fleishmann & Harris, 1962; Korman, 1966). Considerate leadership was often related to follower satisfaction or morale, and Consideration and Initiation of Structure were sometimes but not always predictive of group performance. The failure of this carefully constructed and comprehensively researched behavioral measure to predict leadership led many researchers to throw up their hands in frustration and seemed to be yet another instance of leadership research leading to no coherent conclusions.

Legitimacy

One of the brightest spots in the early empirical work on leadership was the series of studies conducted by Hollander, which illuminated some of the facets of leadership status accrual and legitimacy. In both laboratory and field research venues, Hollander (1964; Hollander & Julian, 1970) found that individuals in groups gain status through the demonstration of task-related competence and loyalty to group values. Status acquisition is associated with the accrual of so-called "idiosyncrasy credits," which can be thought of as units of group

acceptance that can be “spent” to influence others and provide leeway from group norms to allow for innovation in group processes and views.

This pioneering work on how individuals decide to follow those in leadership positions has retained its currency to the present day, in part because it embodies both cognitive and behavioral elements in its approach. Contemporary information-processing theories of leadership posit leadership “prototypes” that are characterized by the elements of competency and trustworthiness that are the bases for the accrual of idiosyncrasy credits. Recent work by Hogg and his associates (Hogg, Hains, & Mason, 1998) applying social identity theory to leadership perception indicates that, despite a tendency for followers to value leaders who embody group values (the basis for perceptions of trustworthiness in Hollander’s model), they also heavily weight task relevant competence in leadership evaluation. Those basic determinants of leadership status turn up in more recent approaches to understanding leadership judgments. A fuller discussion of the role of perception in leadership process appears later.

The Mid-1960s to the Mid-1970s: The Contingency Era

The Contingency Model

The study of leadership took a dramatic change of direction with the publication of Fiedler’s first articles (1964) and subsequent book (1967), which presented a new approach to understanding leadership effectiveness. The contingency model of leadership effectiveness emerged as an answer to Stogdill’s (1948) call for an approach based on the interaction of leader traits with situational parameters, but it did not start out that way. Early work (Clevlen & Fiedler, 1956; Fiedler, 1955, 1958) tested the predictive validity of a leadership trait measure on the basis of the leader’s views of coworkers. The measure, which eventually came to be known as the *Least Preferred Coworker (LPC) scale*, differentiated leaders who viewed poorly performing coworkers in very negative terms (thought to reveal a very strong concern with effective task performance) from those who viewed poorly performing coworkers in less

negative terms (hypothesized to reflect a greater emphasis on interpersonal relationships).

Apparently promising early work found that task-oriented leaders were more effective, but subsequent studies yielded results showing that relationship-oriented leaders had more effective teams. Confused but not deterred by these anomalous findings, Fiedler reanalyzed a large number of studies—this time classifying the group settings in terms of the degree of support and cooperation offered by followers, the clarity and structure of the group’s task, and the leader’s formal authority to direct and reward followers. These three variables were combined into a dimension of “situational favorableness” (Fiedler, 1967) or “situational control” (Fiedler, Chemers, & Maher, 1976), thought to reflect the degree to which the overall situation gave the leader a feeling of certainty, predictability, and control over group processes.

When the leader’s orientation (i.e., LPC score) was correlated with group performance across the dimension of situational favorableness, a reliable relationship was found. Specifically, groups led by task-oriented leaders performed best in situations of high control and predictability or very low control and predictability, and groups led by relationship-oriented leaders performed best in the situations of moderate control or predictability. The explanatory rationale for these findings was that the relatively more directive, task-focused leadership style is most appropriate when an orderly situation provides the leader with the clarity to give directions and the follower support to be sure of his or her performance, and the highly volatile and unpredictable environment of the very low control situation also requires the steadying influence of clear directions and structuring leader behavior. However, the more interpersonally oriented, participative style of leadership was thought to function most effectively when the complexities of a moderate-control situation required greater delicacy to navigate a poorly understood task or to avoid the dangers associated with uncertain follower support.

The inductive method by which the contingency model was constructed and the highly complex nature of its predictions led to many criticisms of the model during the 1970s (Ashour, 1973; Graen, Alvarez, Orris, & Martella, 1970). However, subsequent research and

extensive meta-analyses (Peters, Hartke, & Pohlmann, 1983; Strube & Garcia, 1981) provided strong support for the basic principles of the model. (For a more complete discussion of the development of the contingency model and the controversy surrounding its validity, see Chemers, 1997.) Another criticism of the contingency model was its apparent assumption that a leader could not choose to be both task and relationship oriented when the situation demanded it. Some other contingency approaches did not make that same assumption.

Normative Decision Theory

Energized by the potential of a contingency approach to explain leadership performance, but working from a more deductive theoretical base, Vroom and Yetton (1973) offered a model of decision-making effectiveness that integrated leaders' decision strategy with situational factors. Leaders were conceived as having a range of decision-making strategies available to them that varied in degree of follower involvement in the process—ranging from autocratic styles (leader makes the decision with minimal follower input) to consultative styles (leader makes the decision after getting follower opinion and advice) to group or participative styles (leader and group make decision together, with equal weight).

The situational parameters included in the model were represented as a series of questions arranged to yield a decision tree. Leaders seeking the most effective decision strategy were asked to analyze situational factors that included the clarity and structure of the task and surrounding information, the degree of support for the leader and the organization among the followers, the degree of conflict among subordinates, and the time urgency for a decision to be made. The model specifies that when the task is clear and the followers supportive, the leader should use the more time-efficient autocratic styles. If the task or information is unclear, using the consultative strategies increases the information yield and likelihood of a higher quality decision. When the leader lacks follower support, the participative strategy helps to ensure follower commitment to the decision and its implementation. Empirical research on the normative decision model is not extensive but is

generally supportive of its basic premises (Field & House, 1990).

The contingency model and normative decision theory have many features in common. They are both focused on the leader as the central actor in the group's efforts to interface with the task environment. Both theories regard the leader's task as to gain the group's support in solving problems and implementing solutions effectively. Also, they both hypothesize that more directive approaches will be most effective when a clear task and a supportive group give the leader the certainty to take charge but that more participative strategies will work better when a less clear and orderly environment argues against bold action and autocratic direction. The two theories part company in the situation of very low control with the contingency model more focused on immediate group performance through leader direct action but normative decision theory suggesting more participative strategies to build a more supportive environment over the long run.

Path-Goal Theory

Contingency theories held the promise of correcting the weaknesses of earlier approaches to leadership effectiveness prediction. For example, one promising but disappointing approach had been the attempt to relate leader behavior (e.g., the LBDQ score) to organizational outcomes. R. J. House and his associates (R. J. House, 1971; R. J. House & Dessler, 1974; R. J. House & Mitchell, 1974) picked up that gauntlet and attempted to merge traditional behavioral approaches with emerging developments in the study of worker motivation to understand the impact of the leader on the motivation and performance of followers.

Path-goal theory argues that the leader's main purpose is to motivate subordinates by helping them to see how their task-related performance could help them to achieve their personal goals. Research within the path-goal framework attempted to understand how a leader's directiveness (i.e., Initiation of Structure) or supportiveness (i.e., Consideration) behaviors might affect subordinate motivation and performance. Proceeding logically, the theory predicted that a leader's structuring behavior would be motivating to a subordinate when the subordinate's task environment lacked

structure because of insufficient training or experience or a highly complex task. However, when a subordinate had sufficient structure, leader directiveness would be regarded as overly close monitoring or "pushing" and would have negative effects. Consideration behavior was seen to have its most positive effects when the subordinate needed psychological or emotional support to deal with an aversive work environment (made so by a boring or unpleasant task). Consideration was viewed as superfluous in situations that were engaging and intrinsically interesting to the subordinate.

The typical research paradigm for path-goal theory studies was to divide a group of subordinates into situations of low clarity (presumably interesting, but potentially frustrating because of lack of structure) and of very high clarity-predictability (presumably boring and uninvolved). Leader structuring behavior was predicted to have positive effects on subordinate motivation and performance in the former situation but not the latter, whereas the reverse was true for leader considerate behavior. Path-goal theory generated a considerable body of empirical research support for the basic propositions. Considerate behavior, for example, was usually related to positive subordinate attitudes under boring or aversive task situations but often had similarly positive effects across all situations. Results regarding structuring behavior were even less consistent.

A study by Griffin (1981) that included measures of subordinates' "growth need strength" (Hackman & Oldham, 1976) indicated that the needs and expectations of subordinates played a role in determining when subordinates needed or wanted different types of leader behavior. Growth-oriented, challenge-seeking subordinates were quite comfortable with unstructured and challenging tasks and were therefore less receptive to directive leader behavior under unstructured or structured conditions. However, these growth-oriented subordinates were very responsive to supportive behavior when the task was boring. The more change-averse, low-growth-need subordinates were comfortable with leader structure across all situations but needed less support when a task was ostensibly boring. A reasonable conclusion to be drawn from this literature is that leader behavior that is seen as supportive by subordinates is likely to lead to positive reactions and

higher motivation and that both characteristics of the task and of the subordinate will contribute to that receptiveness.

In an interesting extension of path-goal theory, Kerr and Jermier (1978) argued that if the leader's purpose is to supply missing elements in the subordinate's job environment (e.g., structure or support), then other sources of those missing elements might make the leader's behavior redundant and unnecessary. Their "substitutes for leadership" theory predicted, for example, that if a job provided plenty of task-relevant feedback, leader structuring behavior would be unnecessary, or if a compatible and cohesive work group provided emotional support, leader consideration would be redundant. Under such conditions, leader behaviors were hypothesized to show minimal or even negative relationships with subordinate motivation, satisfaction, or performance. However, a review of a number of studies of substitutes-for-leadership hypotheses indicated very little support for the theory's predictions (Podsakoff, Niehoff, MacKenzie, & Williams, 1993) and revealed that a leader's behavior remains very important to subordinates regardless of varying situational conditions.

The research literature on the contingency theories suggests that actions by a group's leader can have strong effects on the motivational and emotional states of followers and on the successful accomplishment of the group's task. The relationship of the specific leader actions to those outcomes depends on the interaction of those actions with relevant features of the interpersonal and task environment.

The Mid-1970s to the Mid-1980s: Cognitive Models and Gender Concerns

The growing influence of cognitive theories in social psychology led to a similar interest among leadership researchers. Two broad classes of investigation were concerned with perceptions of leaders by others (i.e., followers, superiors, and observers) and leaders' perceptions and evaluations of subordinates.

Leadership Perceptions

In the mid-1970s, studies involving ratings of leader behavior began to reveal certain anomalous findings. Eden and Leviatan (1975) re-

ported that when research participants were asked to make ratings of leader behavior by simply imagining a leader, the resultant data showed factor structures similar to those derived from ratings of actual leaders. Staw (1975) showed two sets of observers the same videotape of a group interaction but told the observers that the group had either been very successful or very unsuccessful on task performance. Observer ratings of the "successful" leader were higher on measures of both directive and supportive leadership than were the ratings of the "unsuccessful" leader.

That ratings of leaders might be strongly biased created a problem on both theoretical and methodological grounds. Leader legitimacy, a central construct in understanding the bases of leader influence, was based on follower perceptions. Furthermore, almost every research paradigm in the leadership field depended on ratings of leader behavior (Rush, Thomas, & Lord, 1977).

Attribution theory (Jones & Davis, 1965; Kelley, 1967) provided a theoretical framework for the investigation of leadership biases. Taking a very strong position, Calder (1977) argued that the very concept of leadership is rooted in popular language and poorly articulated as a scientific construct. He argued that with no way of measuring leadership apart from social perceptions, leadership exists primarily as an attribution rather than a testable construct and should, therefore, be abandoned as a subject of scientific inquiry. Few researchers were willing "to throw the baby out with the bathwater" and began instead to make a systematic study of leadership perceptions and the processes that gave rise to them.

A useful model was provided by the research on implicit personality theories, which Hastorf, Schneider, and Polefka (1970) defined as a structure of association about what traits or characteristics are related that guides and organizes perceptions, thoughts, and memories about a phenomenon. Implicit theories of leadership, then, would define the assumptions that people held about what behaviors leaders displayed and how those behaviors were associated with group and organizational outcomes.

An extensive research program by Lord and his associates (Lord, 1985; Lord, Binning, Rush, & Thomas, 1978; Lord & Maher, 1991) revealed that leadership attributions were based on two

processes. *Recognition* processes determined when an individual's behavior would result in the perception of that person as a leader. Observers were found to hold highly articulated prototypes (Cantor & Mischel, 1979; Rosch, 1978) of leadership. When an actor's behavior showed sufficient overlap with the prototypically driven expectations of observers, a leadership attribution was made. Once an individual was seen as a leader, selective attention and memory reinforced that judgment.

Leadership judgments were also found to be influenced by *inferential processes*. Because implicit theories of leadership associate team success with effective leadership, observers are likely to infer the presence of good leadership from evidence of group success (Phillips & Lord, 1981). Thus, once a person is seen as a leader, observer inferences are likely to reinforce and enhance that perception. Of course, if a person's characteristics, such as gender or race, are inconsistent with observers' prototypic expectations, then such a person is less likely to be perceived as a legitimate or effective leader despite any objective achievements.

The strength of common beliefs in the importance of leadership for group outcomes led Meindl (1990) to develop the "romance of leadership" concept. In an ingenious series of experiments and naturalistic observations, Meindl showed that any remarkable group or organizational outcome, whether highly positive or highly negative, is likely to be attributed to leadership effects, while other reasonable causes are largely ignored.

Although the strong susceptibility to perceptual biases in the observations of leadership might have constituted a problem for research methodology, it opened a fascinating area for theoretical development. If leadership is a process of social influence, then factors that affect the legitimacy, credibility, and influence of leaders become a central aspect of leadership function.

Another important component of the leadership process involves the perception of followers by leaders. Almost every theory of leadership posits that a central function of leadership involves the direction of subordinates. The follower-oriented contingency theories, such as path-goal theory, maintain that it is the leader's responsibility to provide the subordinate with task-directed guidance or emotional support to

help them to be effective and satisfied. Implicit in these premises is the expectation that leaders are able to judge what kinds of behaviors on their part are likely to have positive effects on subordinates. In other words, leaders must observe the actions and reactions of subordinates to judge what is needed. This clearly places attributional processes at the center of the relationship between leader and follower.

Mitchell and his associates (Green & Mitchell, 1979; Mitchell, Larson, & Green, 1977; Mitchell & Wood, 1980) applied Kelley's (1967) attribution model to leader evaluations of subordinates and the effects that those evaluations have on subsequent leader actions. That research revealed that processes affecting attributions of followers by leaders are consistent with earlier attribution research. For example, head nurses who were asked to make judgments about the causes of poor performance by a floor nurse integrated available information about the consistency of the poor performance over time and setting and how the performance compared with that of other nurses. Also consistent with earlier work was the finding that these judgments tend to be susceptible to the *fundamental attribution error* (Jones & Nisbett, 1971; Ross, 1978), in which performance is more likely to be ascribed to internal, personal causes (such as motivation or ability) over equally plausible external causes (such as poor training or support). Furthermore, the more extreme the consequences of the poor performance (e.g., a patient injury), the greater the tendency to ascribe cause to the individual. Mitchell and Wood (1980) demonstrated that the sort of attributions made by the supervisor (i.e., internal vs. external [to the subordinate]) had a significant impact on the kinds of leadership actions (e.g., training, punishment, termination) that were likely to be used by the leader to address the situation.

Brown (1984) made some insightful observations about leader attributions in real-world work groups. Most attribution studies do not involve any real or long-term involvement between the observer and the actor. However, in real work groups, leaders and followers are bound together in a relationship of mutual dependency; that is, when followers perform poorly, leaders are usually held to account. Furthermore, leader and follower are in a relationship of reciprocal causality in that it is the leader's responsibility to direct and support

the work of the subordinate. Subordinate failure might be evidence of leadership failure. These factors strengthen the tendency of leaders to make ego-defensive attributions, blaming subordinates for poor performance and possibly taking personal credit for group success. Inaccurate judgments that arise from these blind spots can easily erode the working relationship and bases of influence between the leader and follower.

Gender Effects

Few careful, scientific studies of differences between men and women in leadership effects were done prior to the 1970s. Despite the lack of scientific evidence on this issue, popular views were widespread and strong. Bowman, Worthy, and Greyser (1965) reported that surveys of managers and business school students revealed the strong belief that women were unsuited for managerial roles and would make poor leaders. Popular writers, such as Hennig and Jardim (1977), offered quasi-theoretical justification for such beliefs by proposing that women lacked the skills and traits necessary for managerial success. It is interesting that the 1980s brought a rash of popular books, also with little empirical basis, that proposed that feminine traits, such as warmth, nurturance, and flexibility, made women better leaders and managers than power-oriented, controlling male leaders.

The questions that present themselves in this area concern whether men and women actually are different in their leadership orientations and behaviors and whether such differences have an effect on follower reactions and group or organizational performance. Three theoretical explanations exist for potential differences between male and female leaders: (a) women and men are biologically different (e.g., hormones, temperament, etc.), (b) men and women are culturally different (i.e., differentially socialized for gender roles), and (c) observed differences between men and women and reactions to those differences are structurally determined (i.e., by differences between men's and women's relative standing in organizational structures).

One thing that is very clear is that the leadership stereotypes held by the general public about males and females are quite different. In 1971 Bass, Krusell, and Alexander reported an

analysis of male managers' responses to a survey of attitudes toward women at work indicating that men felt that women lacked career orientation, leadership potential, and were undependable and emotionally unstable—all of which made women unsuitable candidates for management. Schein (1973, 1975) found that stereotypes of women, held by both men and women, were very different from stereotypes of men, with the latter being much closer than the former to stereotypic perceptions about the characteristics of a manager. As late as 1989 Heilman, Block, Martell, and Simon replicated Schein's (1973) study and found little change in these stereotypes. Clearly, then, the common view was and may still be that women and men are very different in their leadership style and performance. How good is the evidence?

In a classic treatise on the subject of gender differences, Deaux (1984) effectively dismissed any biological bases for gender differences in social behavior. The evidence simply does not support such differences. But what about the possibility that differences in socialization to gender roles carry over to behavior in the workplace, so-called "gender role spillover" (Nieva & Gutek, 1981)?

In the second edition of the *Handbook of Leadership*, Bass (1981) reported that the empirical evidence available at that time showed no consistent pattern of differences between men and women in supervisory style. However, definitive analysis on this topic waited until Eagly and her associates conducted a series of meta-analyses on male-female differences in leadership style (Eagly & Johnson, 1990), leadership emergence (Eagly & Karau, 1991), and leadership evaluation (Eagly, Makhijani, & Klonsky, 1992). A careful reading of these analyses suggests that to the extent that the observations of leadership were taken in organizational settings; using standard behavioral measures; by observers, superiors, or subordinates, the differences found between men and women are so small as to be of little practical significance. Women tend to emerge as leaders about as often as men, and they tend to be evaluated similarly to men when all other variables are equal.

How about when other variables are not equal? Women tend to emerge less frequently and are evaluated less positively in situations where followers are hostile to women in

leadership or when organizational settings are not congenial to female leadership. In other words, women show few differences from men in actual leadership behavior but are still susceptible to the impediments created by negative stereotypes about female leadership. This conclusion is quite compatible with Deaux's (1984) view that gender is more important as a social category than as a biological or cultural characteristic. Negative views of women lead to negative expectations that bias women's opportunities for achieving leadership roles and being fairly evaluated in those roles. Research on the structural approach supports this view.

J. House (1981) argued that actors in a social structure are often strongly influenced by their place in that structure. In a series of studies on women and power in organizations, Ragins (1989, 1991; Ragins & Sundstrom, 1989) found that women face a number of barriers along the path to acquisition of status and power in organizations. However, when male and female managers are matched for level (i.e., power and authority) within the organization almost no differences are found in leader behavior, performance, or acceptance by subordinates.

The conclusion that may be drawn from this literature is that although few real differences in leadership behavior or style exist between men and women, false but persistent stereotypes impede equal access and fair evaluation for women in organizational leadership.

The Mid-1980s to the Mid-1990s:

Transformational Leadership and Cultural Awareness Transformational Theories

A major shift of interest in leadership research was sparked by the work of a political historian. Burns's (1978) book on great leaders differentiated *transactional* leaders, whose relationship to followers was based on mutually beneficial transactions, **from transformational leaders, who influence followers to transcend personal interests and transform themselves into agents of collective achievement. This was an exciting perspective for a field locked in molecular analyses of trait-situation interactions and perceptual biases.**

Anticipating this development by a year, R. J. House (1977) published a theoretical analysis of charismatic leadership in which he analyzed the characteristics of historical leaders who elicited

extraordinary levels of devotion and commitment from followers—for example, Gandhi, Martin Luther King, Jr., and others. House identified three sets of characteristics that typified charismatic leaders. *Personal* characteristics included a strong belief in the moral righteousness of one's beliefs, high levels of self confidence, and a strong need to influence and dominate others. *Behaviors* included dramatic goal articulation, role modeling of desired attitudes and behaviors, image building, exhibiting high expectations of and confidence in followers, and arousing follower motives that were consistent with desired behavior (i.e., aggressive or altruistic motives). Finally, *situational* influences might include high levels of environmental stress (e.g., economic crises, social upheaval) or an opportunity to express group goals in moralistic or spiritual terms.

The most careful, empirical analyses of transformational leadership have been conducted by Bass and his associates (Bass, 1985; Bass & Avolio, 1990a, 1990b, 1993). Bass started by interviewing managers about transformational leaders they had known. On the basis of the interviews Bass built and validated a questionnaire designed to measure transformational leadership: the Multi-Factor Leadership Questionnaire (MLQ). Factor analysis of the MLQ yielded seven factors, including three "transactional" factors (Contingent Reward, Management By Exception, and Laissez-Faire Leadership) that were associated with moderate to poor leadership effects and four transformational factors that were associated with high levels of subordinate motivation and group or organizational success. The transformational factors included (a) Idealized Influence (charisma), reflecting extremely high levels of leader competency, trustworthiness, or both; (b) Inspirational Motivation, involving the articulation of the group's goals in emotional, moral, or visionary terms; (c) Intellectual Stimulation, entailing the encouragement of followers to think independently and creatively and to move away from past ideas or limitations; and (d) Individualized Consideration, relating to the leader's capacity to understand each follower's personal needs and goals. Bass (1998) reported data from many organizations in countries around the world that indicate that leaders who are rated highly on transformational leadership characteristics by superiors, peers, or subordi-

nates are associated with high-performing teams and organizations.

House and Shamir (1993) returned to the study of transformational leadership, emphasizing the psychological processes of followers that mediated the effects of charismatic or transformational leader actions. Weaving together path-goal theory (with its emphasis on expectancy motivation) with theories of intrinsic motivation and self-concept, they argued that transformational leaders have several significant psychological effects on followers. By placing the group's mission into moral or spiritual contexts, such leaders raise the salience of collective goals over personal or selfish interests of the followers. Second, tying the follower's self-concept to the group mission makes self-esteem contingent on group success and fosters self-motivation and self-regulation by followers.

Both the theoretical explication and performance outcomes associated with transformational leadership make the construct quite compelling but also leave the leadership scholar with another conundrum. Transformational theories are stated in terms of "universally" effective leadership behavior—that is, for all leaders in all situations. It is difficult to square that idea with the equally compelling evidence supporting various contingency theories that show that effective leadership is the result of the appropriateness or fit between particular behaviors and particular situations. Some recent developments applying the concept of self-efficacy (Bandura, 1982) to leadership offers a potential resolution of this contradiction.

Leadership Efficacy

A number of contingency model studies showing that in-match leaders felt more confident and in control (Chemers, Ayman, Sorod, & Akimoto, 1991; Chemers, Hays, Rhodewalt, & Wysocki, 1985) led me and my associates to conduct a series of studies designed to assess the role of leadership confidence or efficacy in performance. Chemers, Watson, and May (in press) reported concurrent, predictive, and discriminant validity for a measure of leadership efficacy in a longitudinal study of Reserve Officer Training Corps cadets. Cadets filled out a measure of self-perceived leadership ability and were rated for military leadership potential by their military science instructors. Several

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months later, the same cadets were followed up through a 6-week U.S. Army-sponsored summer leadership camp in which cadets rotated through everyday leadership roles, participated in training, and were tested in realistic military simulations. Ratings by course instructors, training camp superiors, peer cadets, and simulation exercise grading staff all revealed dramatic effects indicating superior performance of cadets who expressed greater confidence in their leadership capability. By way of discriminant validity, these performance ratings were not predicted by general self-esteem, and leadership efficacy did not predict nonleadership performance (e.g., marksmanship, land navigation).

Watson, Chemers, and Preiser (1996) reported the results of leadership efficacy and team collective efficacy on the success of small college basketball teams (both men's and women's). Before the start of the basketball season, players were administered questionnaires assessing leadership efficacy and collective team efficacy. Teams were followed through the season, and the team's win-loss record provided the measure of performance. Path analyses revealed clear and significant support for the role of efficacy in team performance. The strongest predictor of team success was team collective efficacy, and team efficacy was, in turn, most strongly predicted by leadership efficacy self-ratings of the identified team leader (usually the captain). Other factors potentially related to team success (e.g., previous season record, number of returning players, starters, etc.) were controlled for in the analyses and did not prove as predictive as the efficacy measures. (No differences were found between men's and women's teams.)

These findings on leadership efficacy provide a possible resolution of the contradiction between contingency theories, which make situation-specific predictions of leadership success and transformational theories, which make universal predictions. The fit between the leader's personal characteristics and situational parameters is an important determinant of a leader's confident and efficacious behavior—behavior that is the basis for the critical functional elements of leadership. That behavior, in turn, gives rise to the effective group processes and positive perceptions by observers that constitute transformational leadership.

Transformational leadership measures leadership at the outcome (i.e., dependent variable) level, whereas the contingency theories tend to place more focus on the leader characteristics (i.e., independent variable) level. Leadership efficacy may be the psychological link between contingent fit and transformational behavior. Later in the present article a functional integration of contemporary leadership theory will elaborate these critical functions.

Cultural Differences

Two streams of thought on cultural difference have had an influence on leadership theorizing. One stream involved the work of social psychologists who were interested in the effects of culture on social processes but not necessarily interested in leadership (e.g., Fiske, 1991; Markus & Kitayama, 1991; Triandis, 1990, 1993). These theorists focused attention on the dramatic value differences (i.e., individualism vs. collectivism) among various national groups. Briefly stated, individualistic cultures (such as those of western Europe and English-speaking countries) place a high value on personal expression and achievement, whereas more collectivist cultures (including most of the rest of the world) are more concerned with group harmony and collective success.

In a value-based approach more closely focused on leadership and motivation, Hofstede (1980, 1983) presented an analysis of four dimensions of national values with profound effects on organizational functioning. *Power distance* refers to people's comfort with and acceptance of large differences in power, influence, and wealth among groups or classes within the society. *Uncertainty avoidance* reflects the extent to which individuals in a society resist risk and unexpected events by emphasizing rules, norms, and expertise. Hofstede's third dimension was *individualism-collectivism*, and the fourth was *masculinity-femininity*, which differentiates cultures in which members value stereotypically masculine pursuits such as strength, competitiveness, and material achievement from those in which members are more concerned with quality of life and concern for others.

The basic thrust of the value theories is that organizational processes in different cultures will reflect what is considered appropriate and

important. For example, leaders should be seen as aloof and powerful in high power distance cultures; as expert, confident, and orderly in high uncertainty avoidance cultures; as paternalistic and caring in collectivist cultures, and as macho and competitive in masculine cultures. Likewise, the needs of followers and the nature of the leader-follower relationship—for example, as manifested in a desire for structure (uncertainty avoidance) or personal achievement (individualism)—would affect the ways that leaders and followers interact in the determination of follower satisfaction, morale, and motivation.

A second, more focused and more empirical stream of research involved testing various leadership theories across different national groups. In Japan, Misumi (1984; Misumi & Peterson, 1985) conducted an extensive program of laboratory and field research, influenced by work in the United States on the LBDQ factors Initiation of Structure and Consideration. Misumi adapted the LBDQ to Japanese culture by identifying two broad classes of leader behavior: (a) behavior associated with work accomplishment through direction and productivity emphasis (called *Performance*) and (b) behavior intended to maintain high group morale (called *Maintenance*). Misumi and Peterson (1985) reported that the most productive work groups in Japanese organizations were led by supervisors who were high on both Performance and Maintenance behavior.

Ayman and Chemers (1983) reported similar results for Iranian managers. They factor analyzed a Persian translation of the LBDQ to which they added some probe items related to the tendency for the worker to identify the supervisor in fatherly terms (i.e., "My supervisor is like a kind father to me"). Ayman and Chemers found that structuring, consideration, and the new items collapsed into a single factor, which they labeled *Benevolent Paternalism* and which was strongly associated with subordinate satisfaction and performance ratings by superiors. Ayman and Chemers concluded that subordinates in highly collectivistic and power-oriented cultures derive satisfaction from a leader who is both directive and nurturant, whereas subordinates in individualistic, low-power cultures such as the United States are more satisfied with a leader who provides followers with autonomy and opportunities for

personal achievement. Here again we see that the successful leader is the one who provides subordinates with an atmosphere conducive to the fulfillment of the followers' personal needs and goals but that the nature of those needs and goals is influenced by culturally socialized values.

The 80 or 90 years of leadership research briefly described in the preceding pages cover a lot of territory. From contingency theories to transformational leadership, and cognitive, gender, and cultural factors, a complex pattern of theoretical and empirical material has been generated. The question remaining is whether a coherent integration of these seemingly disparate findings is possible.

A Functional Integration

The apparent complexity of research findings and theoretical perspectives in the field of leadership might be reduced if one examined this literature by focusing on the major functions that leaders need to fulfill to be successful. I believe that there are three such functions. A leader must build credibility in the legitimacy of his or her authority by projecting an image that arouses feelings of trust in followers (*image management*). A leader must develop relationships with subordinates that enable those subordinates to move toward individual and collective goal attainment (*relationship development*). Finally, leaders must effectively use the knowledge, skills, and material resources present within their group to accomplish the group's mission (*resource deployment*).

Image Management

The definition of leadership provided earlier stressed that social influence is at the core of the leadership function. Influence depends on credibility. For followers to abdicate personal autonomy and allow themselves to be led, they must believe that the leader's authority is legitimate. The information-processing models of leadership make clear the central role of the perceptions on which legitimacy is based. Individuals who are seen as behaving in ways that are consistent with observer-held leadership prototypes are afforded authority, and subsequent perception, attention, and memory are more likely to reaffirm the leader's legitimacy.

We also know that the specific traits or behaviors associated with leadership credibility vary somewhat by leadership domain (e.g., political leadership vs. business leadership) and across cultures (Lord, Foti, & De Vader, 1984; Lord, Foti, & Phillips, 1982). Nonetheless, a certain commonality exists across leadership prototypes. As Hollander (1958, 1964) demonstrated in his early work on leadership status accrual, leaders must be seen as competent in task-relevant abilities and as honest, trustworthy, and loyal to group norms and values. This makes a great deal of sense. Leaders need task-relevant competencies to move the group toward a goal, and they must be trustworthy to ensure that the goal pursued is in the collective interest.

The literature on charismatic and transformational leadership is consistent with this perspective. Bass's (1985) concept of idealized influence suggests that such leaders are seen as having exceptional abilities. R. J. House's (1977) discussion also addresses the extensive efforts of charismatic leaders in demonstrating their loyalty to the group cause—frequently by taking great risks (e.g., Martin Luther King, Jr.) or incurring significant hardship to follow the path of the cause (e.g., Gandhi, Joan of Arc).

Relationship Development

Many leadership theories focus on the leader's responsibility in motivating and guiding followers to enable them to achieve task goals. The work of Graen and his associates (Graen, 1976; Graen & Cashman, 1975; Graen, Cashman, Ginsburgh, & Schiemann, 1978; Graen & Scandura, 1987) places the quality of the leader-follower relationship at the center of effective leadership.

The literature suggests that effective relationships are based on the provision of levels of coaching and guidance that are appropriate to the follower's individual situation. The situation is determined by the follower's task-relevant skills and knowledge and personal values, needs, and goals. Patterns of cultural socialization, personal histories, and contemporary factors might all contribute to the follower's readiness for one or another type of treatment. Effective leadership, then, depends on the leader's ability to overcome potential egocentric and defensive biases to make accurate judg-

ments about where the subordinate is and where the subordinate needs to go next. At the highest levels of leadership performance, these capabilities are captured by Bass's (1985) concepts of *intellectual stimulation* (i.e., delicately targeted coaching and guidance that arouse intrinsic motivation) and *individualized consideration* (i.e., the subtle but comprehensive awareness of the follower's situation).

Resource Deployment

Once a leader has established credibility and mobilized follower motivation, the resultant energies, knowledge, skills, and material resources must be harnessed and directed to achieve success in the group's mission. The successful deployment of the group's resources has two facets: first, the empowerment of the individuals in the group, and second, the effective interface of group processes with task and environmental demands. Both facets are influenced by contingency principles.

Individuals are not always able to make the most effective use of their skills and abilities. Contemporary theories of intelligence (e.g., Sternberg, 1988) suggest that effective interaction with an individual's environment (i.e., successful utilization of personal resources) is influenced by the fit between the actor's set of skills and knowledge and the critical demands of the challenge. Contingency theory research conducted by me and my associates (Chemers & Ayman, 1985; Chemers et al., 1985, 1991) has found that leaders whose motivational orientation (LPC score) was in match with environmental factors (situational control) not only outperformed less well-matched leaders but also showed higher levels of satisfaction, more positive mood and confidence, and lower levels of stress and stress-related illness. This pattern of findings suggests that leaders who are in a good "fit" with their leadership situation are more confident, and more of them perform at high levels.

My later research on leadership efficacy (Watson et al., 1996) suggests that leadership confidence (resulting from a good person-situation match or as a dispositional characteristic) is associated with high levels of team performance and positive evaluations by followers and observers. Feelings of efficacy may be one of the primary moderators of the effects of

contingency effects on leadership performance at the personal level.

Both Fiedler's (1967; Fiedler & Chemers, 1974, 1984) contingency model and Vroom and Yetton's (1973) normative decision model are built around the notion that internal group processes, such as decision-making processes, must match with external task demands to ensure high levels of group performance. For example, overly centralized information-processing strategies and autocratic decision structures are likely to be more effective in highly routine and predictable leadership situations than they are in more ambiguous, less predictable situations requiring creative solutions to novel problems. Effective leadership depends on recognizing the nature of the group's environment and matching group process to external demand.

On reflection, it appears that self-confidence or self-efficacy might play an important role in many aspects of leadership effectiveness. If one examines the three functions just discussed, one sees a role for self-confidence in each. Effective image management depends on projecting the appearance of competence. Confidence in one's abilities provides a good marker for competence. When we observe competent people it is natural to infer that their confidence is based on some actual competence. R. J. House's (1977) analysis of charismatic leadership emphasized that outstanding leaders do indeed exhibit high levels of self-confidence. Staw and Barsade (1992) reported that MBA students with more positive emotional dispositions were seen as more appropriate for leadership roles by observers in an assessment center management simulation.

Confidence may also play a role in relationship development. Effective coaching and guidance are dependent on accurate perceptions of subordinates and cogent attributions about the causes of their behavior and performance. The major impediment to such perceptual accuracy are the ego-defensive motivations created by the leader's own concern for positive evaluations. When a group performs poorly, the leader may blame subordinates and be less attentive to problems caused by other factors, such as the support structure or his or her own shortcomings. Confidence in one's own abilities might allow leaders to be less concerned about such

judgments and allow for empathic relationships with followers.

The deployment of personal and team resources should be especially affected by confidence. On the personal level, a voluminous literature in social psychology tells us that confident and optimistic people are better able to cope with environmental demands (Scheier & Carver, 1985) and stressful life events (Taylor & Brown, 1988) and are more likely to take risks (Isen, Nygren, & Ashby, 1988) and solve problems creatively (Isen, Daubman, & Nanicki, 1987)—all of which are characteristics that are related to effective leadership.

At the level of team deployment that requires the ability to read the environment accurately and respond flexibly, confidence should also play a role. Staw and Barsade (1992) measured management students for positive or negative dispositional affect. More upbeat individuals performed more effectively at a business decision task, integrating more information and making better decisions. Experiments by Guzzo (1986) and by Zaccaro, Peterson, Blair, and Gilbert (1990) also show that *collective efficacy* (i.e., the shared perception of group members of the capability and effectiveness of the group) has been positively related to group performance in both experimental and organizational settings.

We also know that when leaders feel that they are in a congenial, accepting environment they are more likely to act in a directive, "take-charge" fashion (Eagly & Johnson, 1990) and that directive leaders are more likely to make effective use of their cognitive abilities (Fiedler & Garcia, 1987).

Summary and a Few Conclusions

This historical overview of leadership research reveals the extent to which this research area, like many others, is influenced by periodic fashions in research theory; for example, an emphasis on traits at one time; on cognition at another time, and so on. When we take a longer view, we are able to find common findings and streams of thought across theoretical perspectives. The functional integration offered in this article is an attempt to take such a perspective driven especially by an emphasis on what leaders must do to be effective, that is, to influence followers toward goal attainment.

My analysis argues that leaders must first establish the legitimacy of their authority by appearing competent and trustworthy to their followers. When leaders are extremely effective in image management they are seen as possessing remarkable, charismatic levels of capability and trust. Next, leaders must coach, guide, and support their followers in a way that allows the followers to contribute to group goal attainment while satisfying their own personal needs and goals. To do this, leaders must understand the abilities, values, and personalities of their subordinates, so they can provide the type of coaching and support that will be most effective. Sometimes leaders are so effective at creating a motivational environment that followers merge their personal goals with collective group goals and are transformed in the process. Finally, effective leaders must use the skills and abilities possessed by themselves and their followers to accomplish the group's mission. The first step in utilizing these resources is creating a sense of confidence and personal empowerment that encourages each group member to release his or her best efforts. The second step is focusing the resultant resources on the task environment in a way that provides the best fit between group process and environmental demand. Sensitive information processing and intelligent decision making are the keys to the group environmental interface.

In the final paragraphs of this article I raise the hypothesis that leadership efficacy and group collective efficacy may be the most important contributors to each of the functional necessities of leadership performance. Feelings of efficacy in the leadership role are thought to lead to calm decision making, sensitive interpersonal relations, ambitious goal setting, bold action, and long-term perseverance that energize and maintain the leader and the followers to effective common effort.

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