INDIVIDUAL AND ORGANIZATIONAL CHARACTERISTICS THAT FACILITATE AND RESTRICT BOUNDARY SPANNING OF TEAM LEADERS

Frank J. Latendresse

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Committee:

Mark A. Earley, Co-advisor

Patrick D. Pauken, Co-advisor

Terry L. Herman, Graduate Faculty Representative

Vanessa Druskat

Donna K. Trautman

Jane V. Wheeler
ABSTRACT

Mark A. Earley, Co-Advisor
Patrick D. Pauken, Co-Advisor

The purpose of this study was to identify the personal and organizational characteristics that facilitate and restrict boundary spanning (BS) of external leaders. The study was a two-phase sequential exploratory mixed-method study. The first phase examined the relationship between boundary spanning and emotional intelligence (EI) of external team leaders. Through interviews, the second phase explored individual and organizational characteristics that facilitate or restrict boundary spanning in external team leaders who scored differently on boundary spanning than predicted based on emotional intelligence scores.

Bivariate regression and correlation showed that boundary spanning is strongly related to emotional intelligence. Three external leaders were selected for Phase II because they had nearly the same EI alignment scores but very different BS alignment scores. I wanted to know why, if EI and BS have such a strong relationship, the BS scores of these three leaders were so different. Qualitative data from 14 interviews revealed that leader distance and need are both facilitators and restrictors of boundary spanning. Boundary spanning is not just something that the leader does for the team. Boundary spanning is important based on an individual’s need. If the need is low, the leader would offer less help and, therefore, the appraisal of the leader’s boundary spanning would be lower. Also, the leader must understand when there is a need and how to react to the need by offering the appropriate help for the appropriate duration. The ability of the leader to understand the need of the team members requires relationship building. Relationship building is made easier when the leader distance (physical proximity, social distance, and perceived occurrence interval) is low. As emotional intelligence increases, so does the ability to
recognize and utilize need and distance to span the boundary for the team, as demonstrated in the following graphic.

Boundary spanning is important on both individual and organizational levels. Organizations must learn to set the environment to facilitate boundary spanning as a valued part of the culture. Individuals must increase their own level of boundary spanning awareness and practice so that as superiors, as external leaders, or as team members they can reduce leader distance, understand need, and negotiate the most effective individual and team relationships for high performance.
To Jenny, thank you for taking care of *everything* while I studied. You don’t just maintain; you plan, do, and follow through. I love you.
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CHAPTER I. INTRODUCTION

A growing trend today in organizations is arranging into self-managing teams. Members of a self-managing team working on a new product development project are responsible to lead themselves and to accomplish the team’s goals (Druskat & Wheeler, 2003; Jones, 2004). Team members represent a cross section of functional areas. For example, an automotive ride control product development team may include at least one person to represent each of the following areas: project management, finance, marketing, engineering, fabrication, quality assurance, communications, programming, and content expertise. Each team member is responsible for representing his or her department considerations during development, thus creating interdependent teams. Companies organize into self-managing teams for productivity and efficiency; each team is totally responsible for setting goals, schedules, processes, behavioral norms, and possibly staffing (Dyer, 1995). But, little research and practice-based attention has been paid to the external leaders who manage self-managed teams (Druskat & Wheeler, 2003; Zaccaro, Rittman, & Marks, 2001).

One reason that external leaders have been left out of the research may have to do with the concept of the self-managed team as a wholly independent development team. However, according to Druskat and Wheeler (2003), self-managed team success is dependent upon external leadership. The appointment of an external leader may be formal, as part of strategic alignment, or informal, as a means to complete projects. Typically one gets to be an external leader by demonstrating expertise in whatever niche area he or she works and shows promise for success with higher responsibility. Often one becomes an external leader because, as part of job responsibility, he or she is responsible for several large projects (sometimes this is called program management) and creates or is assigned teams to complete the projects. In such a case,
self-managed teams are appropriate because they allow creativity among teams and foster team identity (Garcia-Prieto, Bellard, & Scheneider, 2003), which in turn adds to a sense of belonging (Hobman, Bordia, & Gallois, 2003). The external leader may have responsibility beyond managing teams. Therefore, practically, an ability to build and empower teams seems to be crucial to overseeing several project teams. The more self-sustaining the teams, less leadership is required and the more time can be spent helping teams who need it most or for building new teams (Yukl, 1999).

Recent research has shown that external leaders that contributed most to their team’s success excelled at one important skill—managing the boundaries between the teams and the organization (Druskat & Wheeler, 2003). Boundary spanning, as this skill is widely known, describes the ability to move between teams that are separated by function, hierarchy, or proximity to access resources that can benefit the primary team. The boundary spanner understands the language specific to the teams with whom he or she works (Cross & Parker, 2004b; Hoffer Gittell, 2003). Druskat and Wheeler use boundary spanning to describe behaviors of external leaders who bring needed resources (expertise, money, and marketing) to the reporting team that otherwise would not be available. Through a qualitative study of highly successful external leaders of self-managed teams, Druskat and Wheeler identified four functions essential to effective boundary spanning. First, in relating, “external leaders must continually move back and forth between the team and the broader organization to build relationships. Success in this area requires three behaviors: being socially and politically aware, building team trust and caring for team members” (p. 67). Second, in scouting, “external leaders must demonstrate three behaviors: seeking information from managers, peers, and specialists; diagnosing member behavior; and investigating problems systematically” (p. 68). Third,
persuading “requires two behaviors: obtaining external support and influencing the team” (p. 69). Finally, with empowering, “external leaders of self-managed teams can empower those teams by demonstrating three behaviors: delegating authority, exercising flexibility regarding team decisions and coaching” (p. 70).

Boundary spanning abilities of external leaders require a focus on social awareness and relationship management because, according to Cross and Parker (2004b), boundary spanning requires developing, utilizing, and maintaining a social network of resources that can be mobilized when needed. Social awareness and relationship management are two dimensions of emotional intelligence (Goleman, 1998b). Thus, emotional intelligence (EI) may be a factor that facilitates an external leader’s ability to manage the boundary between the team, the organization, and beyond. According to Mayer and Salovey (1997), emotional intelligence involves the ability to perceive accurately, appraise, and express emotion; the ability to access and /or generate feelings when they facilitate thought; the ability to understand emotion and emotional knowledge; and the ability to regulate emotions to promote emotional and intellectual growth. (p. 10)

A descriptive definition of emotional intelligence is a consistent, correct demonstration of, with self-regulation at the center, an individual who is able to perceive, monitor, and utilize his or her own emotions and perceive, monitor, and through interactive feedback, utilize others’ emotions for a specific situation (Boyatzis, Goleman, & Rhee, 2000). According to Goleman, Boyatzis, and McKee (2002), emotional intelligence includes the four competencies shown in Figure 1.
As described in the next several paragraphs, Druskat and Wheeler’s (2003) four functions of successful external leaders appear to be aligned with emotional intelligence competencies of social awareness and relationship management identified by Goleman, Boyatzis, and McKee (2002). Although social awareness and relationship management are the focus here, such emphasis is not to minimize the importance of anticipated self-perception, which is the basis that undergirds all other competencies (Roberts, R. D., 2005, Personal Communication).

Druskat and Wheeler (2003) identified relating as the external leader function that requires that the leader move back and forth between the team and the broader organization to build relationships, display social and political awareness, build team trust, and care for team members. The social awareness competency of emotional intelligence describes organizational awareness as “A leader with a keen social awareness can be politically astute, able to detect crucial social networks and read key power relationships. Such leaders can understand the
political forces at work in an organization, as well as the guiding values and unspoken rules that operate among people there” (Goleman et al., 2002, p. 255).

Druskat and Wheeler (2003) identified **scouting** as the external leader function that requires that the leader seek information from managers, peers, and specialists, diagnose member behavior, and investigate problems systematically. The relationship management competency of emotional intelligence describes ways in which leaders display *conflict management* operationally as “Leaders who manage conflicts best are able to draw out all parties, understand the differing perspectives, and then find a common ideal that everyone can endorse. They surface the conflict, acknowledge the feelings and views of all sides, and then redirect the energy toward a shared ideal” (Goleman et al., 2002, p. 256).

Druskat and Wheeler (2003) identified **persuading** as the external leader function that requires that the leader obtain external support and influence the team. The relationship management competency of emotional intelligence describes ways in which we know how leaders *influence* team members as “Indicators of a leader’s powers of influence range from finding just the right appeal for a given listener to knowing how to build buy-in from key people and a network of support for an initiative. Leaders adept in influence are persuasive and engaging when they address a group” (Goleman et al., 2002, p. 256).

Druskat and Wheeler (2003) identified **empowering** as the external leader function that requires that the leader delegate authority, exercise flexibility regarding team decisions, and coach team members. The relationship management competency of emotional intelligence describes “Leaders who are adept at cultivating people’s abilities show a genuine interest in those they are helping along, understanding their goals, strengths, and weaknesses. Such leaders
can give timely and constructive feedback and are natural mentors or coaches” (Goleman et al., 2002, p. 256).

Purpose of the Study

The purpose of this study was to identify the personal and organizational characteristics that facilitate and restrict boundary spanning of external leaders. The study was a two-phase sequential exploratory mixed-method study. The first phase examined the relationship between boundary spanning and emotional intelligence of external team leaders at a mid-sized Midwestern university. The second phase explored individual and organizational characteristics that facilitate or restrict boundary spanning in external team leaders who scored differently on boundary spanning than predicted based on emotional intelligence scores. In the first phase, correlational and bivariate regression analyses addressed the relationship between the boundary spanning and emotional intelligence of external team leaders. Based on the pattern of scores from the quantitative data, participants were selected and an embedded theory-building case study approach was used to explore the functioning of external leaders with regard to their ability to support their teams.

Research Questions

Phase I - Quantitative

In Phase I, team members, superior, and external leader (self) reported perceptions of the external leader. Correlational analyses identified the relationship between boundary spanning and emotional intelligence of “self” and aggregate “others” surveys. This was an exploratory study, so research questions were used and not hypotheses, as would be expected in a confirmatory study (Tashakkori & Teddlie, 1998). The following research questions were addressed in Phase I:
Question 1. Is there a correlation between boundary spanning and emotional intelligence?

Question 2. Which emotional intelligence cluster is most strongly related to which boundary spanning cluster?

Question 3. Can we predict boundary spanning proficiency from emotional intelligence?

Question 4. Are some leaders “better” boundary spanners than predicted based on emotional intelligence?

Phase II – Qualitative and Mixed Methods

In Phase II, case studies were selected from leaders identified in research question 4 as individuals who scored differently at boundary spanning than expected. The goal of Phase II was in-depth case studies to explore these leaders. The following research questions were addressed Phase II of this study:

Question 5. What individual and organizational characteristics facilitate boundary spanning (beyond emotional intelligence) of external leaders?

Question 6. What individual and organizational characteristics restrict boundary spanning (beyond emotional intelligence) of external leaders?

Question 7. What individual and environmental characteristics could be prescribed to facilitate external leaders’ boundary spanning?

Question 8. Since external leaders will be selected for Phase II based on their boundary spanning scores, how do case studies compare?

Significance of the Study

The ability to span the boundary between a team and the organization has been found to be an important role of a successful external team leader. Identifying factors that facilitate and
restrict the external leader’s ability to span boundaries will enable an organization to systematically prescribe the environment to support successful boundary spanning of external leaders. The positive effects of boundary spanning are experienced through more successful self-managed teams that directly affect time, cost, and quality of projects and, therefore, increase company profit and better developed team members, external leaders, and the organization that comes into contact with the external leaders.

Research suggests that boundary spanning is positively related to effective external leaders’ performance (Cross & Parker, 2004b; Druskat & Wheeler, 2003); that emotional intelligence is positively related to performance (Goleman et al., 2002); and that successful team leaders produce more successful projects on time, within budget, and at expected quality (Cooke-Davis, 2002). Few studies have examined the relationship between boundary spanning and emotional intelligence in an external management context (Leban, 2003). None to date have applied quantitative research methods to identify the correlation between boundary spanning and emotional intelligence within and among external team leaders. In addition, few studies have examined the personal and organizational characteristics that facilitate boundary spanning in external leaders. This study yielded a process of personal behaviors and organizational elements to support boundary spanning. Understanding the individual and organizational characteristics that facilitate and restrict boundary spanning allows an individual or company to prescribe the environment and training most likely to result in effective boundary spanning.

Focusing on the external leader was purposeful for three reasons. First, external leaders directly affect the performance of their teams (Druskat & Wheeler, 2003). Thus, facilitating effective boundary spanning in external team leaders has a multiplicative spread of benefit because they are a structural network hub for their teams (Cross & Parker, 2004b). Secondly,
there is little research on external leaders of self-managed teams regarding the relationship between boundary spanning and emotional intelligence which begs the following questions: What is the relationship between boundary spanning and emotional intelligence? Which emotional intelligence competency is most strongly related to which boundary spanning function? Can we predict effective boundary spanning from emotional intelligence? Which leaders are “better” boundary spanners than predicted based on emotional intelligence? These questions required an examination of the boundary spanning and emotional intelligence dimensions of external leaders as perceived by superiors, and team members. Third, the competencies of emotional intelligence can be trained. If research conducted in the present study shows that emotional intelligence is a moderator of boundary spanning, then organizations will have yet another way to affect and develop boundary spanning skills of team leaders.

Theoretical Perspective

The study of boundary spanning is about mutual relationships between individuals, sets of individuals, individuals and teams, and teams. The external leader creates relationships between himself or herself and individual team members, peers, external resources, superiors, and other organization individuals. The external leader creates relationships between himself or herself and teams by dealing with individuals and the team as a whole. A relationship requires a give and take between parties based on desire, not duty (Mayeroff, 1995). “Emotional intelligence (EI) is about the ‘two-way’ exchanges between individuals” (Schumacher, 2005, p. 17). Boundary spanning creates a situation whereby an individual (external leader) creates two-way exchanges, but one may be an individual and the other may be a team. It could be a team because team governance is created to protect both the existence of the team and the individuals who decide to be part of it (Mayeroff, 1995). The team governance must include relationships
with outside network connections for guidance (vision, strategy, evaluation) and resources (time, money, expertise).

The external leader creates boundary spanning relationships between teams in two ways. First, processes among teams are similar so that each can share the same language. Shared processes require communication among teams to establish, understand, utilize, and amend processes. Second, when an external leader speaks to either the organization or a team, he or she is representing, or is an advocate for the other. Therefore, like it or not, the value of the external leader transfers to the team being represented by the external leader. Attaching representation of the external leader to a team makes it even more important for the external leader to be aware of the environment and to consider how he or she will be viewed and the consequences of actions or inaction.

Research has been conducted to identify and describe the functions and behaviors of successful leaders (Cox, 1993; Kouzes & Posner, 2002; Manz & Sims, 1989; Mumford, Marks, Connelly, Zaccaro, & Reiter-Palmon, 2000; Schein, 1992; Zaccaro & Horn, 2003). Recent studies have identified boundary spanning as a major function of successful external leaders (Druskat & Wheeler, 2003). Druskat and Wheeler identified four functions (relating, scouting, empowering, persuading) of highly effective external leaders as related to boundary spanning. The four functions identified by Druskat and Wheeler support several studies (Ancona & Caldwell, 1992; Mumford, Scott, Baddis, & Strange, 2002). Many studies have identified personality traits and states of successful leaders: emotional intelligence (Goleman et al., 2002), self-efficacy (Bandura, 1997b), self-regulation (Kanfer, 1996), goal orientation (Bell & Kozlowski, 2002), and situation awareness (Endsley, 2000). Although these studies have shown significant impact of each of these traits and states on the performance of the leader, they do not
account for the social skills that are required to operate as a boundary spanner. These studies do not examine the relationship between boundary spanning behaviors and emotional intelligence competencies, nor do they identify individual and environmental characteristics that facilitate successful external team leadership.

Boundary spanning research is necessary to identify the configural effects of boundary spanning and emotional intelligence competencies because it allows an external leader to support teams without being involved in the day-to-day operations. The more effective the external leader in building support for his or her teams, the more successful his or her teams can be. Boundary spanning was identified by the Team Leader Questionnaire (TLQ) because it is the only scale designed to measure the four functions of boundary spanning as defined by Druskat and Wheeler in 2003. Also, the TLQ is a 360-degree scale that creates a more realistic report of boundary spanning behaviors. Further, the TLQ is similar in style to the Emotional Competence Inventory (ECI) (Boyatzis & Sala, 2004) so the participant will not have to change focus to learn a new response protocol.

Boundary spanning requires development by the external leader of a social network of latent contacts who are willing to mobilize on behalf of the external leader (Cross & Parker, 2004b). Because social networks are built on relationships, and because relationships require perception, awareness, feedback, and monitoring of interpersonal communication, effective boundary spanning is not possible without emotional intelligence. Emotional intelligence includes competencies that moderate relationship building and management (Boyatzis et al., 2000; Goleman, 1998b; Goleman et al., 2002; Matthews, Roberts, & Zeidner, 2004; Mayer & Salovey, 1997; Zeidner, Matthews, & Roberts, 2004; Zirkel, 2000). Although the reliance of boundary spanning on relationships and the reliance of relationship management on emotional
intelligence appears to be evident (see discussion earlier in this chapter), research has yet to
develop such a relationship; the present study is the first. The emotional competence inventory
(ECI) was utilized because it does have wide acceptance and high reliability, because it is a 360-
degree scale that allows for a better representation of behaviors beyond self-report, and because
it is appropriate for measuring emotional intelligence competencies within the work context

Definitions of Terms

For the purpose of clarity and cohesiveness in this document, the following terms have
been defined as indicated below:

**Boundary Spanning:** “Boundary spanners provide critical links between two groups of
people that are defined by functional affiliation, physical location, or hierarchical level” (Cross
& Parker, 2004b, p. 74). For this study, the definition goes further to include behaviors of an
external leader in which he or she brings needed resources (expertise, money, marketing) to the
reporting team that otherwise would not be available (Druskat & Wheeler, 2003).

**Collective Efficacy:** A measurement of confidence of a group’s competence that includes
each individual group member’s self-efficacy score and each individual’s a measure of each
individual’s belief that the group as a unit has competence (Bandura, 2000).

**Emotional Competence:** A learned behavioral competence based on emotional
intelligence and resulting in exceptional performance (Goleman, 1998b; Schumacher, 2005).

**Emotional Competency Inventory (ECI):** A 360-degree emotional competence
assessment. The ECI overall results measure emotional intelligence. The ECI measures four
clusters of competencies including: self-awareness; self-management; social awareness;
relationship management (Boyatzis & Sala, 2004; Schumacher, 2005).
**Emotional Intelligence Clusters:** The four clusters that measure emotional intelligence. These include self-awareness, self-management, social awareness, and relationship management; as measured by the Emotional Competency Inventory (Boyatzis & Sala, 2004; Schumacher, 2005).

**Empowerment:** Giving employees authority to make decisions and be responsible for their outcomes (Jones, 2004). Empowerment is a construct that includes four constructs related to a person’s beliefs about his or her work: its purpose; ability to complete the task; freedom to decide how to do the work; freedom to decide what work to do (Pinder, 1998).

**External Leader:** A leader who is ultimately responsible for the success of a self-managed team (Druskat & Wheeler, 2003).

**Feedback:** Reciprocal communicative relationship between project leader and team member to denote the effectiveness of the communication and project development strategies.

**Project Manager:** Project managers are the leaders of the teams and are responsible for project success. They use expertise to continually assess project process and manipulate variables to ensure that the project completes on time, within budget, and with the level of quality agreed upon in the project contract.

**Project Resources:** All people and things (e.g., money, equipment, software, development, etc.) required to complete a project.

**Self-efficacy:** Belief in one’s ability to complete a goal (Bandura, 1997b).

**Self-managed Team:** Work team whose members are jointly responsible to lead themselves and to accomplish its goals (Druskat & Wheeler, 2003; Jones, 2004).
**Situation Awareness:** “The perception of elements in the environment within a volume of time and space, the comprehension of their meaning, and the projection of their status in the near future” (Endsley, 1988, p. 87).

**Social Capital:** “The collection of resources owned by the members of an individual’s personal social network, which may become available to the individual as a result of the history of these relationships” (Emans, Munduate, Klaver, & Van de Vliert, 2003; Van Der Gaag & Snijders, 2005, p. 1). “Resources embedded in a social structure which are accessed and/or mobilized in purposive actions” (Lin, 2001, p. 40).

**Team:** “A distinguishable set of two or more people who interact, dynamically, interdependently, and adaptively toward a common and valued goal/objective/mission, who have been assigned specific roles or functions to perform, and who have a limited life-span of membership” (Salas, Dickinson, Converse, & Tannenbaum, 1992, p. 4).

**Team Leader Questionnaire (TLQ):** A 360-degree measure of boundary spanning behaviors. The total “self” and “other” score identifies the level of boundary spanning. The TLQ is arranged into six clusters: (1) Building team trust in the leader; (2) Empowering the team; (3) Coaching; (4) Persuading the team; (5) Political awareness; and (6) Seeking information in the broader organization (Druskat & Wheeler, 2003).

**Delimitations**

The delimitations of this study involved the following. First, participation was voluntary and did not represent a random sample. Second, only three external leaders were studied in depth in Phase II and were participants who represent high, average, and low boundary spanning alignment scores. In addition, all participants were selected from the same organization; findings are not generalizable to other organizations. All participants worked in the same hierarchical line.
in the organization; findings will not be generalizable within or among other hierarchical lines. Participants worked in an academic institution; findings are not generalizable within or among non-academic institutions.

Limitations

The study was limited by the nature of self-report reliance. Further, specific to EI, Furnham, Petrides, and Spencer-Bowdage (2002) found that individuals with high EI tend to be suppressors of negative emotions, suggesting bias in self-report of adjustment. The scales used in Phase I are both Likert-type summated scales used to measure attitudes of level of agreement or disagreement with a declarative statement. Therefore, the reasons for a score are not identified, meaning that two people could give the same score for completely different and unrelated reasons making it more difficult to predict future scores (Edirisooriya, 2005, April). The purposive participant selection procedure decreased the generalizability of findings. In the qualitative phase of research, findings could be subject to other interpretations per the coders. The broad scope of emotional intelligence and its effect on boundary spanning compared to many other variables (e.g., experience, subject matter expertise) makes it difficult to specifically attribute emotional intelligence to boundary spanning.

Organization of the Remaining Chapters

The remaining chapters of this proposal are as follows: Chapter II Literature Review, Chapter III Quantitative Methodology, Chapter IV Qualitative Methodology, Chapter V Quantitative Results, Chapter VI Participants and Hierarchical Structure, Chapter VII Individual Composites, Chapter VIII Social Structure: Distance and Need, and Chapter IX Discussion and Conclusion.
CHAPTER II. LITERATURE REVIEW

This chapter presents a review of the literature related to successful external leaders and specifically explores project team leadership, emotional intelligence, social networking, and the environment that facilitates boundary spanning. Although the information is presented in a linear format, the relationships of the topics are not linear or ranked, they are symbiotic. Leadership, boundary spanning, emotional intelligence, and social networks thrive “because of the connected existence of the other” (Zaccaro & Horn, 2003, p. 770).

External Project Team Leadership

Project Management

A “project” for purpose of the current study, is a job with specific goals and time, cost, and quality parameters. A project could be differentiated from typical work tasks in that it would require people to come together to complete the project and then disband at the completion. Some organizations may only label a project if it requires more than three months of effort. Other organizations may call a project anything that requires tracking. A project is typically coordinated by one person who may be called the project manager. Project managers are the leaders of the teams and are responsible for project success. A project manager may be an internal or external team member. An internal project manager may also play the role of one of the development team members. An example of in internal project manager is the person who is a team member responsible for coordination and process throughout the production cycle. An external project manager may not play a role in the day-to-day operation of the development team, but may report out the progress of the team toward the goal. An example of an external project manager is a person who assigns a project for the team, but does not lay out the specifics of the production and team dynamics that an internal project manager does. An example of an
external project manager or “external leader” for the current study is one who has several project teams reporting to him or her. Having several reporting teams requires that the project manager work as a leader to influence each team to perform at a high level. Project managers use expertise to continually assess project process and manipulate variables to ensure that the project completes on time, within budget, and with the level of quality agreed upon in the project contract. According to Pfahl, Klemm, and Ruhe (2001), typical project management goals are to build a specified product or process, control the development schedule, control project cost, and to meet or exceed the specified quality of the delivered end product. The project manager has been viewed as a critical factor of project success since the early 1970s (Baker, Murphy, & Fisher, 1983; Belassi & Icmeli Tukel, 1996; Locke, 1984; Martin, 1976; McDonough, 2000; Pinto & Selvin, 1989; Sayles & Chandler, 1971).

According to Cooke-Davis (2002), there is a difference between project success (criteria evaluated by the overall objectives of the project) and project management success (criteria evaluated by performance measures against time, cost, and quality). There are really three issues that need to be addressed for project success: (a) project management factors, (b) team member factors, and (c) organizational factors that lead to successful projects. The present study focuses on the third because these factors include systemic individual and environmental characteristics that facilitate and restrict success of many projects.

Rubin and Seeling (1967) studied project management in terms of failure and success factors and found that while experience of the project manager is not a critical success factor, the size of the past projects managed does impact performance (Belassi & Icmeli Tukel, 1996). Avots (1969) identified the first of three reasons for project failure as the wrong choice of project manager, followed by unplanned project termination and lack of support by upper management.
Each of these failure reasons can be mediated to a large extent by team- and organization-focused effective boundary spanning external team leader behaviors. Choice of project manager can be influenced by proper attention paid by staffing with experienced individuals and supporting the project manager with coaching and personal development (empowering, relating); unplanned project termination can be controlled through strategic planning of projects that are assigned by upper management (e.g., it would be unwise to begin a development project that has building funds, but inadequate implementation funds) (scouting, persuading); and lack of support by upper management can be reduced through scouting, relating, and persuading. Empowering, relating, scouting, and persuading relate to the functions of highly successful external leaders as identified by Druskat and Wheeler (2003) and will be discussed later.

Errors in project management may be due to self-efficacy when such a project manager who has extremely high self-efficacy makes scheduling and resource errors causing the project deliverables to be late or incomplete. “Self-efficacy may have a low positive effect, or even a negative effect at very low and very high levels of performance, and a high positive effect at moderate levels of performance (2nd and 3rd quartiles)” (Latham & Pinder, 2004, p. 26). One project-related example of the effect of low self-efficacy includes a team that continually has projects cancelled prior to completion due to upper management strategy changes or inability to complete projects on time due to lack of resources. The team feels it lacks capability and capacity, so does not attempt to complete new projects with the vigor required. A project manager needs to use problem solving strategies to recognize and mitigate these negative aspects of high and low self-efficacy.

Project management requires continual use and refinement of problem solving strategies. A project manager’s ability, interest in, and motivation to pursue a solution to satisfactory
resolution is moderated, in part, by his or her goal orientation. Bell and Kozlowski (2002) described two types of goal orientation (learning goal orientation and performance goal orientation) and how they influence an individual’s motivation to pursue a goal. Individuals with a learning orientation are characterized by (1) persistence in the face of failure, (2) use of complex learning strategies, and (3) pursuit of challenging material and tasks. Performance goal orientation is characterized by (1) greater propensity to withdraw from tasks (especially if the chance of failure seems likely), (2) less interest in pursuing difficult tasks just for the challenge, and (3) tendency to seek less challenging tasks where success seems likely. According to Bell and Kozlowski (2002), high levels of learning orientation tend to buffer individuals from the negative effects of failure, thereby helping to increase or maintain self-efficacy. “The stronger the perceived self-efficacy, the higher the goals people set for themselves and the firmer their commitment to them” (Bandura, 1997a, p. 116). As experience is a predictor of a project manager’s success, it is important to select project managers who have the ability to shrug off failure as part of the learning process and as part of experience building for competence.

Project Team

According to Farr-Wharton (2003), there is a positive correlation between the interdependence of group members and the productivity of the group, beyond what each individual brings; it is the synergy that happens when group members combine their experience and talent to complete a task or project. “The greater interdependence of individuals the greater the group productivity beyond simple summation (the whole will be greater than the sum of its parts)” (Farr-Wharton, 2003, p. 273).

Aaron Shenhar (2004) described strategic project leadership based on a decade of qualitative and quantitative research of over 600 projects and documented over 200 case projects.
The goal of the research was to identify why the project could be considered a failure after implementation, even when time, cost, and quality standards of a project have been met; likewise, how a project process that may seem flawed by the typical project management standards could end up as a success. Each case was developed by a team of two to four investigators who audited project documentation and interviewed at least five project members including the project manager, team members, customers, and sponsors. Shenhar identified a difference of management focus as strategically managed projects that focused on achieving business results and operationally managed projects that focused on the tasks of a project (i.e., meeting deadlines, managing project costs). Shenhar described the difference as follows:

Management teams and managers in strategically managed projects spend a great deal of their time and attention on activities and decisions that will improve business results. They create a project strategy, which is connected to the business strategy; and they articulate a clear project vision that is well communicated to all team members. Rather than just focusing on schedule and cost control, they are concerned on a day to day basis with customer needs, and competitive advantage, and future market success; and rather than sticking to the initial production definition and project plan, they keep making adjustments that will create better business outcomes and higher competitive advantage. (p. 570)

Shenhar found that project strategy was the missing link to project success. Only systemic thinking of the complete value chain would allow a project manager to emerge as a project leader. Just as a person should be trained on the up and downstream effects of his or her work to understand the fit within the organization, the project leader should consider the up and
downstream effects of an effective project and how it will fit within the business process to compliment the value stream.

Goal Setting, Self-efficacy, and Performance

Bell and Kozlowski (2002) studied effects of goal orientation and ability on self-efficacy, performance, and knowledge. The participants were 125 undergraduate students in a large Midwestern university who were paid five dollars to complete measures including learning and performance orientation, self-efficacy, knowledge, and performance. The task used in the research was a tactical navy decision making simulation (TANDEM). The participants had to learn to hook targets on the radar screen and then collect data about the target in order to make decisions of whether to take action or clear the target and move on the next. The game required participants to rank priority and to decide which targets required more attention. Participants were given two pre-experimental sessions, one to demonstrate how the system worked and the other to allow a one-minute practice on the simulator. Participants were given nine five-minute practice trials to prepare for the generalization trial. Prior to each trial, they had two minutes to review an online manual and two minutes following each trial to review their feedback. After the third and ninth trials, participants completed self-efficacy measures, which were averaged to create a single measure. Results supported that learning and performance orientations are separate constructs. Results also showed a significant positive relationship between learning orientation and self-efficacy in high performing individuals and a significant negative relationship between performance orientation and self-efficacy in low performers.

Results suggested that “to enhance performance, high-ability individuals should be encouraged to adopt a learning orientation and low-ability individuals should be encouraged to adopt a performance orientation” (Bell & Kozlowski, 2002, p. 504). This becomes important as
organizations rely on internal and external team project managers for tenacity in effectively and efficiently moving the projects through the development cycle. An important facet of efficient and effective leadership is the ability to make informed decisions based on accurate input from various sources.

Self-efficacy requires that feedback loops are created with multiple sources to ensure that behaviors are congruent with performance needed to meet goals. “Cognitive feedback is information on the how and why underlying the accuracy” (Sengupta, 1995, p. 125).

There are two main measures of self-efficacy. The first measure is magnitude, which identifies the level of success a person expects to reach for a given goal. The second measure is self-efficacy strength, intended to identify the confidence level that a person will reach a given goal (Lee & Bobko, 1994). Together, the tools identify the person’s confidence of his or her competence to attain a goal. “Personal goal setting is influenced by self-appraisal of capabilities. The stronger the perceived self-efficacy, the higher the goals people set for themselves and the firmer their commitment to them” (Bandura, 1997a, p. 116).

According to Vancouver, Thompson, Tischner, and Putka (2002), when looked at one person in a longitudinal study, performance helps self-efficacy, but then, high self-efficacy negatively impacts future performance. With high self-efficacy, individuals are prone to more optimistic interpretations of their performance, leading to the perception of a smaller discrepancy between current performance and the goal than they would have with low self-efficacy. Because goal-performance discrepancies are believed to be a motivating force, perceiving smaller discrepancies leads to reduced allocation of resources such as time and effort. With high self-efficacy, argue Schmidt, DeShon, and Chambers (2004), individuals are also “more likely to be more optimistic concerning the ease with which similar levels of performance can be attained in
the future than they would be with low self-efficacy, leading to less subsequent investment of effort than may be necessary to attain a given level of performance” (p. 5). When self-efficacy is low, one is less likely to believe that more effort will lead to goal attainment (Schmidt et al., 2004).

Further study of the relationship between self-efficacy and performance was done by Schmidt, DeShon, and Chambers (2004). The study proposed that the “within-person relationship between self-efficacy and subsequent performance is moderated by progress toward ones overall task goals” (Schmidt et al., 2004, p. 9). Data were collected from 89 undergraduate students at a university in the Midwestern United States who received course credit for their participation. The study modeled the Vancouver et al. (2001) study by utilizing a version of the game MasterMind to identify how long it would take to find a solution. Participants were allowed to make as many attempts as needed to successfully find a solution set and were told that they would play the game several times. The goal was to perform better than 85% of the participants. Prior to each game, the participants were given a self-efficacy magnitude and strength test. The participants also took a perceived discrepancy assessment that was intended to predict success of the next game. During each game, between each row, the participants were given feedback about their progress toward the goal (i.e., how many colors correct and how many placed correctly). Results supported the hypothesis that the within-person relationship between self-efficacy and subsequent performance is moderated by the progress being made on the overall task goal. When individuals perceived that their current progress toward attaining the overall goal was insufficient, self-efficacy was positively related to subsequent performance. However, when individuals perceived that their current progress toward achieving the overall task
goal was greater than necessary, self-efficacy was negatively related to subsequent performance. (p. 15)

When studying between-person effects of self-efficacy on performance, the expected positive relationship between self-efficacy and performance was observed. That is, the between-person relationship showed that persons with higher self-efficacy also tended to display higher performance. However, when studying within-person effects of self-efficacy and performance, past performance was strongly positively related to self-efficacy, while a weaker negative relationship between self-efficacy and subsequent performance was found. Therefore, the within-person analyses showed for any given individual, performance tended to be lower on occasions when their self-efficacy was higher (Vancouver et al., 2002).

**Increasing Self-efficacy**

To increase self-efficacy, a leader could assign different tasks to individual employees for a variety of experiences and assign diverse group members because problem-construction is based on past experience (Reiter-Palmon & Illies, 2004). According to Mumford (1999), the behaviors displayed when people handle unusual or highly demanding situations often show particularly useful predictors of what they can do and how they will behave. Progressing from application of existing knowledge to generation and application of new knowledge, “crystallized reasoning abilities are less important influences on performance and fluid cognitive abilities became more important influences on performance” (Mumford, Costanza, Baughman, Threlfall, & Fleishman, 1994, p. 141). This is important because fluid cognitive abilities may be an important factor in embracing and sustaining a system of change and growth.

Schmidt et al. (2004) cited Locke and Latham (1990) in suggesting that difficult and specific goals coupled with specific and timely feedback may alleviate some of the negative
within-person relationship of self-efficacy and performance. The project manager should set goals for him or herself and for the group, monitor, and continually give feedback specific to the performance toward the communicated goals if the individuals of the group.

A leader should have knowledge and skills for group development, project management, human performance improvement, selecting group members based on depth and breadth of expertise, interest, and ability to build rapport. At the individual level, the leader must have the competence to mentor, counsel, and train on the business process; at the group level, the leader must train on team building, intragroup and intergroup communication, and the business process; at the organization level, the leader must have confrontation meetings and ensure that there are no taboo subjects (Jones, 2004). The leader, as change agent, should be concerned with moving from vertical to shared leadership to build high performance teams. The more leadership is grown, through empowerment at group levels, the less reliant people in the groups will be on a vertical leader (Pearce & Sims, 2002). An important objective of the leader is the development of the self-leadership within followers.

Leaders should be interested in and expect continual change as part of life within the group. Two important attributes of a leader are the understanding of return on change (magnitude and real value, or the cost of change, divided by the movement) and human due diligence (analyzing the emotional, social, and cultural aspects of change) (Conner, 1998). Based on experience and opinion of the researcher, the nature of multimedia project development is one of continual change. Multimedia projects are not commodity pieces that the team members can continually count on. Projects often have different audiences, subject matter experts (who may be considered team members), and sponsors. Each of these three has a different understanding of the time, cost, and quality relationship regarding project development. The leader should be able
to cope well with conflict; identifying, discussing, and analyzing failures involves disagreement about the causes (Cannon & Edmondson, 2001). According to Lewin, as cited in Calabrese (2002), a leader should make an environment supportive of the desired change and make failure analysis safe for discussion. Argyris, as cited in Calabrese, requires that all subjects are discussable (Calabrese, 2002).

**Collective Efficacy**

According to Bandura (2000),

People’s shared beliefs in their collective power to produce desired results are a key ingredient of collective agency. A group’s attainments are the product not only of shared knowledge and skills of its different members, but also of the interactive, coordinative, and synergistic dynamics of their transactions. (p. 75)

“Perceived collective efficacy is not simply the sum of the efficacy beliefs of individual members. Rather, it is an emergent group-level property” (Bandura, 2000, p. 76).

The more team member empowerment is perceived, the more effective the team (Ozaralli, 2003). Followers react positively to clear vision and motivation and are more effective when they have the resources (competence and capacity) to follow through on a project. “An empowered workforce contributes materially to the well-being of the organization, has wide-ranging responsibilities, makes significant decisions, and shares in the rewards” (Green & Hatch, 2002, p. 302). Training in creativity and brainstorming strategies, preexisting creativity, and post-training creative performance positively affects group efficacy prediction of subsequent creative performance (Bandura & Locke, 2003).

There is a positive correlation between the interdependence of group members and the productivity of the group, beyond what each individual brings; it is the synergy that happens
when group members combine their experience and talent to complete a task or project. “The greater interdependence of individuals the greater the group productivity beyond simple summation (the whole will be greater than the sum of its parts)” (Farr-Wharton, 2003, p. 273).

Experienced supervisors do consider contextual performance when evaluating employee performance. As team-based organizations become more popular, contextual performance will become more important in organizations (Borman & Motowidlo, 1997).

Although self-efficacy in a leader may be a specific indicator of successful performance, the leader alone cannot be expected to succeed without organizational support. The environment should be prescribed to facilitate the external leader, and through him or her, the project teams. Throughput includes not only the development of a project, but also the implementation, measurement of success, and feedback of that project to help build actionable knowledge for improving future projects. There are three dimensions of throughput orientation: (1) organizational mindset requires that customer and employee satisfaction are prerequisite to trying to improve profitability; (2) performance measurements adopt throughput accounting that measures throughput, inventory (e.g., developed computer-based training courses that have not yet been used), and operational expense; and (3) decision making so that constraints drive the master production schedule (e.g., if a training program will not be used soon after implementation, it will not be developed; if money is not available for replacing trainees on the job for training, the course will not be assigned; and if budget does not allow a course to be completed, it will not be started) (Boyd & Gupta, 2004).
Boundary Spanning: Functions and Behaviors of Highly Successful External Leaders

According to Dyer (1995), the self-managed team (1) is responsible for complete development of a product or process, (2) has access to needed data, (3) has needed business, technical, and interpersonal skills, (4) has continual contact with the customer, and (5) is rewarded based on team performance. Dyer stated that the requisite systems are not always in place to support the developmental needs or make collaborative opportunities part of the development process.

Ancona and Caldwell (1992) researched what activities teams use to manage the boundaries of their teams. They studied 38 new product team managers and members of 45 new product teams in a high-technology industry. Through mixed-method sequential exploratory research design, data were collected via semi-structured interviews with 38 team managers and team log-data from two of the teams, and questionnaires were completed by members of a different set of 45 new-product teams to generate hypotheses about external activities. Ancona and Caldwell found that teams utilize vertical communication channels to develop positive upper management opinions about the team. Teams utilize horizontal communication channels to coordinate work and solicit feedback; teams also utilize the horizontal networks to identify technical and market environment.

According to Ancona and Caldwell (1992), teams develop one of three distinct strategies for interacting with the environment: (1) participation in very little external activities, (2) focus on a particular external activities, or (3) focus on multiple external activities. Ancona and Caldwell also suggested that the type of external communication, not just the amount, determines team performance and that for long-term success, teams need to implement a comprehensive strategy that does include times of each. This is consistent with Wheatley (1999) in suggesting
that development or evolution works in a spiral-type growth pattern of order to chaos to new order, which allows the team to identify when change is needed and changing into something new that is consistent with who it was and charts a path it believes to be congruent with who it is.

Druskat and Wheeler (2003) compared how highly effective external leaders manage the role with how average external leaders manage the role, paying particular attention to boundary spanning for self-managed teams. Their qualitative inductive theory-building study focused primarily on external leaders. Multiple case study method was utilized because it was shown useful for identifying effective leader behavior (Boyatzis, 1982). Two groups of participants were studied: one sample of external leaders with superior performance and one sample of external leaders with average performance-based on nominations by team members, quantitative goals met for the year, and manager nominations for outstanding leaders. Data were collected through interviews, focus groups, and surveys of other leaders and team members to build and test the theory. A central theme was that high performing leaders used their location at the organization interface or boundary spanning position to their advantage. Druskat and Wheeler found that highly successful external leaders consistently performed four functions: (1) relating with team and organization members and building political awareness, (2) scouting information and staying abreast of activities inside and outside their teams, (3) persuading their teams to attend to organization needs and persuading organization members to attend to team needs, and (4) empowering their teams. The study identified both functions and behaviors of the individual external leader and organizational structures that facilitated the successful boundary spanning.

Effective external team leaders facilitate project teams’ movement through the development process to meet a goal while attending to transactional and transformational relationships within and beyond the team. An important role of effective external team leaders is
to proactively identify and deliver what the team needs at the appropriate time; and facilitate insight, rhythm, and momentum. Rhythm and momentum are used to convey innovation, a sense of flow, and forward movement (Frasco, 2005, Personal Communication). According to many researchers, technical and problem solving competence are among the most important attributes of effective leadership (Andrews & Farris, 1967; Barnowe, 1975; Mouly & Sankaran, 1999; Tierney, Farmer, & Graen, 1999). Attending to the nuances of external leadership requires competence in empowerment, relating to people within and without, scouting for continual situation awareness, and persuading others (Druskat & Wheeler, 2003; Mumford et al., 2002).

Belassi and Icmeli Tukel (1996) differentiated these competencies as strategic and tactical. The strategic role includes management buy-in, planning, alignment of team production with organizational initiatives (e.g., in the fourth quarter, the company will focus on releasing only projects that support shipping and storing), and marketing the teams--increasing external awareness of and planning for the projects. The tactical role includes project team development, individual selection, empowerment, and building trust.

Druskat and Wheeler (2003) call this strategic and tactical set of team-level and organization-level competencies “boundary spanning”. On one hand, boundary spanning drives positive momentum within the teams toward their goals (relating, scouting, persuading, and empowering). On the other hand, working throughout and beyond the organization to ensure the teams have the resources (e.g., information, money, leverage, access to or buffer from outside) they need, when they need it. Druskat and Wheeler (2003) argue that effective boundary spanning of the external leader increases performance of the teams and, therefore, saves time and money for the company.
Ng and Van Dyne’s (2001) research on minority influence creating divergent, creative thinking supports the benefits of boundary spanning in finding that better quality decisions are made when exposed to minority opinion. The expectation here is that as one moves through different subgroups, the individual identity is less tied to the group and, therefore, holds a minority perspective in multiple groups.

Several recent publications support inter-team, department, and industry boundary spanning. *Leadership distance* affects relationship and performance of followers. Leaders can appear to be very distant to followers if leaders (1) are physically distant from followers, (2) maximize their status and power differentials by virtue of their elevated social position, and (3) maintain infrequent contact with followers (Antonakis & Atwater, 2002). Any configuration of the distance could be offset by the ability of the team to reach beyond the team for resources. Though it was not mentioned in the discussion of leadership distance, need is a moderator of the effects of distance. The *need for leadership* is a moderator of the relationship between leader and team performance. A leader is less welcome when he or she is not needed (deVries, Roe, & Taillieu, 2002). The more successful the leader in developing and empowering followers, the less reliant the followers are on the leader for future advice and inspiration (Yukl, 1999). There is a relationship where the higher the abilities of the group (competence, capacity, communication, and performance), the greater the autonomy of the group and each of its members and the lower the impact of a leader. If as a high-performing group, there is no explicit or implicit need for a leader, less leadership will be a factor of success (deVries et al., 2002).

Unwanted or unnecessary intervention will likely result in opposition. Subordinates welcome a leader’s intervention if it is seen as helpful to achieve a goal. Leader intervention is less welcomed or required when the job is highly structured, relies on a large amount of written
material to do the job, or there is a high degree of personal competence. When a moderator
(need) was detected, for example, when employees need prescriptive procedures and structure,
leadership was more strongly related to subordinate outcomes than when there was less need or
no moderator was detected. According to deVries, Roe, and Taillieu (2002), “with low need for
leadership, the relation between leadership and outcomes is weaker compared with high need for
leadership” (p. 122). An important follow-up to this research is a study to identify the
relationship of EI and a leader’s abilities to assess the interpersonal and technical needs of a
group.

It seems appropriate to distinguish between the need for leadership and the type of need.
deVries, Roe, and Taillieu (2002) refer to leadership as a whole, however do not separate
interpersonal from technical need. A group may need a change in the system structure to help
them to become more efficient and effective without needing all the transformational help. The
leader appears to be welcome at all times, or is at no point harmful, when she offers expertise
and charisma (Padsakoff, MacKenzie, Ahearne, & Bommer, 1995), therefore it seems that a
leader more often gets in trouble when she uses a transactional or directional leadership style.
Transactional leadership style is important to ensure continual system validation, which may not
be negative; however, directional leadership may be seen as unwanted by competent group
members at any time.

Therefore, as groups develop and become empowered, the leader may be less involved.
However, a feminist view of growth within a relationship discusses development and
empowerment which “emphasizes both dependence and independence as fluid states that are
neither static nor achieved” (Kark, Shamir, & Chen, 2003, p. 253). The more interdependence of
a group, the greater the performance-beyond the sum of each individual (Farr-Wharton, 2003).
Superleadership goes beyond typical transformational leadership in that a major component is to teach followers to lead themselves (Manz & Sims, 1989).

External leaders of multiple project teams would benefit by understanding the balance of attending to the internal team needs (e.g., cohesion, process, coaching, empowering) while attending to the external needs of the organization (e.g., time, cost, and quality of projects). The key is to understand the external leader’s role in terms of the environment. The external leader must build, utilize, and maintain a social network of people who have access to resources that can help the project teams. The external leader must build a network of relationships with social capital, which goes beyond a rolodex of acquaintances (Lin, 2001). According to Lin, social network contacts must be relationships with people who are willing to mobilize on the behalf of the external leader to offer the correct assistance in a timely manner. Some research suggests that two dimensions of emotional intelligence (social awareness and relationship management) allow the external team leader to be managers of these relationships (Wheeler, 2005, Personal Communication).

Creativity and innovation are not always seen as valuable (Mumford et al., 2002), yet project development is a problem solving process and, therefore, a creative process which has been found to be important to leadership of creative teams and also requires social intelligence (Zaccaro, Gilbert, Thor, & Mumford, 1991; Zaccaro, Mumford, Connelly, Marks, & Gilbert, 2000). Effective team members have resources that are not identified as part of the project resource plan, yet are part of the individual’s “tool box”. An individual’s reach beyond team boundary is one reason he or she may be selected for a team. The more team members have reach, the greater the ability of the team to exceed expectation, even with project constraints.
Relational coordination is not just process, but a human relation system that a project manager has to lead within and between individuals (Hoffer Gittell, 2003).

According to Zaccaro and Horn (2003), there have been “few if any attempts in the leadership literature to articulate the principles and features of an effective symbiosis of leadership theory and practice” (p. 770) and interconnected leadership theory and practice allows each to “exhibit more vibrancy and vitality” (p. 770) because of the other. The importance of the need for practical application of theory is noted. Also important is the need for developing leadership skills within followers as part of leading (Bass, 1990; B. M. Bass & B. J. Avolio, 1994; Manz & Sims, 1989; Pearce et al., 2003; Senge, 1990; Zaccaro & Horn, 2003). Therefore, it is important to identify what the leader does (i.e., relate, scout, persuade, and empower) and also how what the leader does affects both his or her growth as a leader and the leadership growth of the team members as a result of such behaviors (Zaccaro & Horn, 2003). The symbiotic relationship between the four functions of boundary spanning (Druskat & Wheeler, 2003) and leadership growth opportunities for both the leader and team members (Zaccaro & Horn, 2003) are brought together and illustrated in Table 1.
Table 1

*Leadership Development Opportunities with Implementation of the Four Functions of External Leaders*

<table>
<thead>
<tr>
<th>Leadership growth for the external leader</th>
<th>Leadership growth for the team member</th>
</tr>
</thead>
<tbody>
<tr>
<td>• <em>Receive feedback</em> on performance to prevent CEO disease (Byrne, 1991)</td>
<td>• Increase physical <em>proximity</em> to the leader (Antonakis &amp; Atwater, 2002)</td>
</tr>
<tr>
<td>• <em>Hone leadership skills</em> through direct observation (Antonakis &amp; Atwater, 2002)</td>
<td>• Observe first hand for <em>modeling</em> leader behavior (Kouzes &amp; Posner, 2002)</td>
</tr>
<tr>
<td>• Expand <em>social network</em> through networks of team members (Cross, Borgatti, &amp; Parker, 2001)</td>
<td>• Create sense of belonging and <em>community</em> (Kotter &amp; Cohen, 2002)</td>
</tr>
<tr>
<td>• <em>Understand needs</em> of team and members of the team (Antonakis &amp; Atwater, 2002)</td>
<td>• Interact throughout hierarchies to develop <em>emotional intelligence</em> (Goleman et al., 2002)</td>
</tr>
<tr>
<td>• Interact throughout hierarchies to develop <em>emotional intelligence</em> (Goleman et al., 2002)</td>
<td>• Build social capital and build social network (Cross &amp; Parker, 2004b)</td>
</tr>
<tr>
<td>• Cope well with conflict; identify, discuss, and analyze failures involves disagreement about the causes (Cannon &amp; Edmondson, 2001)</td>
<td></td>
</tr>
</tbody>
</table>
### Scouting

<table>
<thead>
<tr>
<th>Leadership growth for the external leader</th>
<th>Leadership growth for the team member</th>
</tr>
</thead>
<tbody>
<tr>
<td>• <em>Develop message</em> for sharing vision</td>
<td>• Share vision</td>
</tr>
<tr>
<td>• Build social network through crossing boundaries <em>(Cross &amp; Parker, 2004b)</em></td>
<td>• Increase embeddedness within team</td>
</tr>
<tr>
<td>• Learn who has what resource</td>
<td>• Model how and where to find resources</td>
</tr>
<tr>
<td>• Learn how to utilize it</td>
<td>• Communicate with leader often to receive more information <em>(Antonakis &amp; Atwater, 2002)</em></td>
</tr>
<tr>
<td></td>
<td>• Access to high-level information</td>
</tr>
</tbody>
</table>

### Persuading

<table>
<thead>
<tr>
<th>Leadership growth for the external leader</th>
<th>Leadership growth for the team member</th>
</tr>
</thead>
<tbody>
<tr>
<td>• <em>Develop ideas</em></td>
<td>• <em>Make case for needs</em></td>
</tr>
<tr>
<td>• <em>Present clearly</em></td>
<td>• <em>Model effective persuasion</em> skills <em>(Kouzes &amp; Posner, 2002)</em></td>
</tr>
<tr>
<td>• Inspire <em>shared vision</em> <em>(Kouzes &amp; Posner, 2002)</em></td>
<td>• <em>Develop negotiation skills</em> to move past yes or no answers</td>
</tr>
<tr>
<td>• Carry out plans</td>
<td>• <em>Develop EI</em> competence through practice</td>
</tr>
<tr>
<td>• <em>Mutual benefit</em> through EI; leader knows what he or she needs and knows what teams and team members need</td>
<td></td>
</tr>
</tbody>
</table>
**Empowering**

<table>
<thead>
<tr>
<th>Leadership growth for the external leader</th>
<th>Leadership growth for the team member</th>
</tr>
</thead>
<tbody>
<tr>
<td>• <em>Set goals</em>: learning and performance</td>
<td>• The empowering leader encourages opportunity thinking, self rewards, self-leadership, and teamwork while being proactive in goal setting (Pearce et al., 2003)</td>
</tr>
<tr>
<td>• Develop new <em>process</em></td>
<td>• The more team member empowerment is perceived, the more effective the team (Ozaralli, 2003)</td>
</tr>
<tr>
<td>• <em>Negotiate</em></td>
<td>• Followers react positively to and model clear vision and motivation and are more effective when they have the resources (competence and capacity) to follow through on a project. “An empowered workforce contributes materially to the well-being of the organization, has wide-ranging responsibilities, makes significant decisions, and shares in the rewards” (Green &amp; Hatch, 2002, p. 302).</td>
</tr>
<tr>
<td>• Build <em>trust</em></td>
<td>• <em>Monitor</em> progress</td>
</tr>
<tr>
<td>• <em>Self-regulate</em></td>
<td>• Create <em>equilibrium feedback</em> (Zaccaro &amp; Horn, 2003)</td>
</tr>
<tr>
<td>• The more successful the leader in developing and empowering followers, the less the less reliant the followers are on the leader for future advice and inspiration (Yukl, 1999).</td>
<td></td>
</tr>
</tbody>
</table>
The functions of boundary spanning are practical and anecdotally important to members of self-managed teams. There are less obvious practical benefits that should be noted, but possibly more important to team members and the organization in the long term. The benefits for the team member’s leadership growth (see Table 1) appear somewhat obvious because any access to a positive influence is helpful both practically for ease of access to resources, but also for exposure to higher-level leader environment to help build a realistic understanding of the demands and needs of the external leader.

According to Zaccaro and Horn (2003), the external leader, as a midlevel manager, is in a different arrangement with the organization; he or she has to create channels of influence both upward and downward. This downward influence is very important because the “executive-level leaders provide system-wide direction and influence, and in many cases never meet all of the followers they influence” (p. 772). Therefore, Zaccaro and Horn suggest that many of the interpersonal behaviors of successful leadership do not apply. Much of the recent leadership literature tends to support such a statement (Byrne, 1991; Kotter & Cohen, 2002; Kouzes & Posner, 2002).

The symbiotic relationship between boundary spanning and emotional intelligence are that boundary spanning supplies information, feedback, practice, and observation to hone emotional intelligence competencies. Boundary spanning requires emotional intelligence competence to help navigate situations within nuance-riddled context in which boundary spanning is conducted.

Emotional Intelligence

Four key competencies of emotional intelligence include self-awareness, self-management, social awareness, and relationship management (Boyatzis et al., 2000; Goleman,
define EI as an intelligence expressed by four specific skills: “the ability to monitor emotions in oneself and others and the ability to manage emotions in oneself and others are claimed to be later developing and psychologically more complex abilities” (p. 6). Of the four abilities, according to Lopes, Salovey, Cote, and Beers (2005), emotion regulation is the most important because it influences emotional expression and directly affects social relationships. They offer an example that one inappropriate emotional outburst could ruin a social relationship.

Although there are several popular researchers in the EI field (Goleman, Salovey, Bar-On, Mayer, and Boyatzis to name only a few) and appear to be three main camps behind the names Boyatzis, Salovey, and Bar-On when it comes to measuring EI, they are all only separated by a nuance. Roberts, Schulze, Zeidner, and Matthews (2004) have described their opinion of where EI research and practical application is headed and have exposed aspects of EI that may be overstated (that EI is more important than IQ and that EI is an intelligence), need support through data (variables outside typical criterion measurement), or have promise of finding likely definitive answers through research (research has only focused on measurement of EI relative to other constructs without consideration of a larger, more inclusive framework, also the concept of fluid and crystallized social-emotional intelligence) (Zeidner et al., 2004). In terms of selecting a scale to measure EI, a major difference between Salovey and Boyatzis is that Salovey’s measure is specifically designed to identify actual emotional intelligence and Boyatzis is concerned with identifying emotional intelligence competencies expressed in the work environment.

Palmer, Walls, Burgess, and Stough (2001) found that transformational leaders did not have stronger relationship with emotional intelligence compared to transactional leaders. The finding is interesting in that one might expect that, based on literature (B. M. Bass & B. J.
transformational leadership requires more emotion-grounded behaviors (Yammarino & Dubinsky, 1994), yet data did not support the initial hypothesis of the study. However, Palmer, Walls, Burgess, and Stough did find significant correlations between some of the individual characteristics of transformational leadership and the emotional intelligence subscales.

Those leaders who considered themselves to motivate and inspire subordinates to work towards common goals (inspirational motivation) reported that they monitored and managed emotions both within themselves and others. Similarly, those leaders who rated themselves as paying special attention to the achievement and developmental needs of subordinates (individualized consideration) also rated themselves as more likely to monitor and manage emotions both within themselves and in others. (p. 8)

The study included 43 participants who were employed in management roles. Each participant completed the multifactor leadership questionnaire (MLQ) to identify his or her leadership style (transformational or transactional). The MLQ is a self-report survey consisting of statements of leadership behaviors and the participant task was to identify the frequency that he or she displayed such behaviors (Avolio & Bass, 1995). Participants who scored as “transformational” were labeled effective leaders. Each participant also completed the modified version of the Trait Meta Mood Scale (mTMMS) to identify his or her ability to monitor and manage self and others’ emotions (Palmer et al., 2001). The mTMMS is also a self-report survey to measure “individual differences in the ability to reflect on (or monitor) and manage one’s emotions” (p. 6).

Palmer et al. (2001) selected the mTMMS for their study, which is based on the work of Salovey et al. (1995) because the ability model of emotional intelligence is the “most
theoretically well clarified” (Palmer et al., 2001, p. 6). While the statements used in the scale may be reliable, the validity is threatened by the fact that it is a one-way self-assessment which in itself is not a reliable type of measure (Roberts, 2005). Palmer et al. did acknowledge that self-report measures are less reliable than performance-based tests, yet also stated that the issue of self-report needs empirical data to substantiate.

Social Competence

Social competence is the ability of a person to read and understand the emotional realities of others and to utilize his or her own skills (leadership, emotional intelligence, tact) to create productive outcomes (Kunnanatt, 2004; Topping, Bremner, & Holmes, 2000; Zirkel, 2000). According to Kunnanatt, in an emotionally competent person, the four competencies of emotional intelligence (self-awareness, self-management, social awareness, social influence) work in unison and absence of any of these competencies “reduces the EI competence of the person and can cause damage to both the personal and social functioning” (p. 492).

A problem with any measure of emotional competence, according to Saarni (2000), is that it entails taking into account the individual’s efficacy motivation for engaging in some emotion-eliciting encounter, the unique sorts of contextual demands and affordances available to that individual, and the values and beliefs the person brings to the emotional experience. Thus, a given measure or instrument could not possibly produce an outcome that said “this person A is more emotionally competent than person B,” for this would disregard the transforming aspect of what happens when we interact with an emotionally affordant context: we can change the context as a result. (p. 85)

Social competence
Summary

Emotional intelligence does not work without feedback and a relationship with another. In Emotional intelligence: The new science of interpersonal effectiveness, Kunnanatt (2004) wrote

Emotional intelligence is the ability of a person to use emotions as a guiding tool for interpersonal effectiveness in his or her social environment. While interacting with members of the social environment, emotionally intelligent people produce win-win relationships and outcomes for themselves and others. Such people develop a magnetic field of emotional attraction around themselves and often are the owners of an ever-increasing network of social relationships and emotional support structures. (p. 489)

Emotional intelligence enables an individual to span boundaries by helping him or her to relate to others and build rapport. Self-efficacy controls the aspect of motivation that helps the individual to continue trying to span the boundaries and make social contacts in the face of adversity.

Social Networking

The new science of networks suggests that networks are not random. And the bell curve does not really apply to many networks (Barabasi, 2003). The power law uses an 80/20 rule to network connections meaning that 80% of the links are attached to 20% of the hubs. The new science differs from previous understanding in that we now can see nearly anything as a series of nodes and hubs. Nodes are individuals with potential to connect and hubs are nodes with many links to them (Barabasi, 2003). The nature of the growth of a site is similar to the relationship between a leader and one who chooses to follow. A leader is only a leader with followers; a large hub only becomes one through others linking to it. So, for example, Web sites that were around...
early in the evolution of the Web have a better chance of being a large hub than newer ones do—think of it as a 1:1 million vs. 1:1 billion. It was much easier to get attention when there were fewer nodes that could connect. According to Barabasi (2003), the reason it took so long to understand the nature of power laws, and scale-free networks is because we did not have a map to see it. The fact that there are over a billion Web sites connected in some way does not mean that we can see them. Some only go one way for instance, have a link out to another site, yet the other site does not have a link back. As of the printing of his book, Barabasi said that only about 40% of the Web sites were even seen by the search engines.

Switching from the Web to social networks, Figure 2 below shows how the distance from one node to another on the other side of the network can be changed from many to few just from a few well-placed contacts. In Figure 2, network A, going from the filled node to the thick-outlined node went from four jumps to two by utilizing other network links. This is how, through the work of Stanley Milgram, Kevin Bacon can be about 2.3 degrees from any other actor who ever worked in Hollywood (Barabasi, 2003).

Figure 2. Example description of networks and links.

The Web is a scale-free network with many directional connections. Meaning one could go from A to B to C to D, but may not be able to go in same path in the reverse. In order to be seen by many people, it is not who you know, but who knows you (Barabasi, 2003).
In 2000 Cass Sustein conducted a survey of 60 political Web sites and found that only 15% had links to sites with opposing viewpoints. Similarly, a study focusing on democratic discourse on the Web found that only about 15% of the Web pages offer links to opposing viewpoints (Barabasi, 2003). Sustein fears that this will cause segregation and social fragmentation. On one hand, access to point-of-view sites causes islands of separation in thought through connecting only to sites with similar opinion. On the other hand, it does make it easier to get to others with similar interests. However, just because we have a similar interest does not mean we have all the same interests; everyone has a personalized configuration of interests. On example is that Amazon.com allows customers to show a favorite book list from people who bought a similar book (say on leadership), but just because I like books about leadership does not mean I like books on leadership of European countries. For another example, legislators may vote the same on whether to go to war, but for very different reasons: one “yes” because oil access is threatened; another because the future safety of our nation has been threatened; and a third because genocide should never be allowed. Similarly, different reasons may be cited by citizens of the invaded country for fighting against the invaders: a sovereign country has the right to control its natural resources; family safety has been threatened; and it was not genocide because the victims all tried to kill that country’s leader and take over the government.

In an organization, social networks can be utilized to increase communication within, but more importantly, among groups. Social networks are used for different purposes such as getting advice, informal training, exchanging information (Han, 1995). The ability of a person to have experience in multiple areas of expertise or significant rapport with people in each functional area of an organization so that he or she can speak the language of that area (boundary spanning) allows more seamless transfer of information and leadership (Hoffer Gittell, 2003). Boundary
spans a hierarchical structure to look more like a series of different, but equal team members who come with their own set of resources—other boundary spanners.

Rigorous efforts to ensure effective process design and communication within and among teams requires consideration of who communicates with whom, when, why, and how. Social network analysis helps managers assess and support groups when effective collaboration is needed for success (Cross & Parker, 2004b). While management cannot force people to network, they can at least make it more likely that these connections will occur. What often distinguishes high performers are larger and more diversified personal networks than those of average or low performers (Cross & Parker, 2004b). Network analysis changes the look of a typical hierarchical organization chart to a constellation-looking set of nodes and connectors. Figure 3 shows the reporting structure and process and communication flow in as designed (A) and in practice (B).
Figure 3. Formal versus informal structure.

A. Formal Organizational Structure

B. Informal Structure as Revealed by Social Network Analysis

Source: Introduction to Organizational Network Analysis (Cross, 2005).
Managing Social Networks

Weak network ties are very important to boundary spanning. These are connections beyond the usual group. Line B (connecting two networks) in Figure 2 above shows a boundary spanning weak link. The people one interacts with often (e.g., project team member) are called strong links. They are the crowd one runs in. The strong link contacts all share the same contacts, like in Figure 2 (p. 43), network A. The difference is that while the contacts in network A share common contacts, only one person in this example has a contact to the person at the end of line B—the bridge to the outside world. So, line B gives access to new and different information, not readily available to the rest of the group. Barabasi (2003) described a study where a researcher surveyed many people to understand where they got their jobs. The vast majority found jobs through weak ties. The strong ties pointed to the same few possible jobs, where the weak ties pointed to a completely different set of available jobs. So, while it is who you know, it’s really who you barely know.

It is important to have many contacts, but the quality of those contacts is also very important and does require some rigor. There are five phases to effective social networking implicitly identified by Cross and Parker (2004).

1) Connecting is making quality connections with people who work in different functional areas of an organization. Connecting requires some effort to reach out to others. This can be in person, by phone, or by email, or by instant messaging for those digital natives. In the connecting phase one must understand what the “other” does and make sure that the other knows what one does. This is a relationship building process, but not necessarily a personal friendship outside of work. Companies can help this phase to happen just by putting people into a room. Barabasi (2003) used an example of a party with ten guests-strangers- where
social ties start forming as people start chatting in small groups. At first the groups are isolated from each other and, though there are connections within each group, all groups are isolated. If three guests switch groups, a giant cluster emerges and though all don’t know each other, they are all now a single social network.

(2) A *trusting* relationship built on more than data transfer in a work sense. Cross and Parker (2004b) found that people build and keep network connections based on interests outside of work (e.g., both have eight-year-old kids who play soccer). This means that opportunities have to be created for people to spend time identifying commonalities. It may be difficult for the organization to see this as time well spent, and it may not be well spent in the short term; however, I suggest that in the long term, every minute of relationship building with someone outside functional boundaries is important. As personal information exchanges happen, and people like each other, relationships are formed. The more people one has at this level, the better. Cross and Parker refer to these people as a latent network—those who could be counted on to mobilize on your behalf. Energy is one aspect that affects the relationship. According to Cross and Parker (2004a), energizers perform better and people closely connected to energizers also perform better. Energizers raise the overall level of performance around them (Cross & Parker, 2004b). According to Lopes et al. (2005) “pleasant emotions tend to elicit favorable responses from others whereas the expression of negative emotions often drives other people away” (p. 113).

(3) *Utilizing* networks separates a social butterfly from a boundary spanner. To utilize the other is not to *use* the other. The beauty of the person who was paying attention and really connecting in Phase 1 and building relationships in Phase 2 is that he or she knows what expertise or access the other has and can tap that connection for help in some way (e.g., data,
other contacts, suggestions, mentoring, gossip, etc.). So, within a group one has to know what all the other team members’ strengths are and his or her availability to the other team member’s strengths. Beyond the group, where social networks are important, spanning boundaries requires understanding what contact is likely to have the information or access to information (or person) needed to complete a task (Cross & Parker, 2004b).

(4) **Maintaining** social contacts must be maintained to keep the “rolodex current.” People change and it is important to know what changes occur and how they may affect the person’s ability or willingness to continue as a latent contact (Cross et al., 2001; Cross & Parker, 2004b). A social check-back is a good approach to know the status. Obviously, each person is unique and part of Phase 2 is getting to know what type and how much follow-up is required for each contact. It may be appropriate to make an overt attempt to return past favors in some way. Maybe in a similar fashion, maybe a lunch. If nothing else, showing concern for, or interest in, the other may suffice. The important thing is acknowledging the value the other has; this is, after all, a relationship built on something other than work.

(5) **Growing** the network could be a sub-section of Phase 2, but it is broader; so it is here.

Everyone knows many people. Chances are that network connections do not always know what expertise is needed, and do not typically initiate conversations such as “so, who do I know that you should know?” It is worth digging into the network of your connections to see if your connection may know someone else who may be of some help. Growing contacts does not necessarily mean knowing new contacts, knowing of contacts through contacts is very helpful and I would consider these weak ties.

Boundary Spanners connect to the outside world. Hoffer Gittell’s (2003) version of boundary spanning is an individual’s action in which the boundary spanner would have to have
expertise in both groups. An example here is of a person who works in a new product
development team as the shipping coordinator for the product launch. If the shipping coordinator
is only assigned to the team for the project and the primary responsibility resides in the
transportation department, this person is a great boundary spanner. He or she can move
throughout both groups and will communicate with more of a systemic view of responsibilities to
the project team. He or she understands the up and downstream effects of the job for the project.
Connection among groups allows the shipping coordinator to bring a series of contacts from a
different functional area to the team if needed. Part of the benefit of working in two worlds is
that this person knows who has what knowledge and knows how to use that knowledge when
needed.

Boundary spanners are very important to large scale change. They promote connectivity
among teams. If these people are also successful social networkers, they are great hubs for
disseminating information among groups. There are ethical considerations here. The organization
itself must be careful not to abuse this network hub. An inconsiderate action of “planting”
information may get desired information of disbursement; however, it may be at the expense of
the hub. Incorrect information reduces the reliability of the hub to anyone he or she contacts with
the wrong information. A few occurrences of misinformation could potentially knock out a hub.

Organizations have two types of peripheral people, those who are not active in networks
but are just as important as central people. One is stuck in the periphery because he or she is new
or has no idea how to work his or her way inside. To help these people, the organization can
create mentoring relationships or add them to a big project; exposure to many people from
different groups is helpful. One concern for having people in the periphery is that isolation does
not make them feel like part of a community; people who do not feel like part of the community
are more likely to leave—costing money and time for the organization. The second peripheral person is so by design. Cross and Parker (2004b) call these intentional and are often experts, specialists who need to stay ahead in their fields, therefore, should be allowed to stay on the periphery.

Central people structure work differently; rather than focus on completing a task on their own, they seek ways to integrate other people into their work. To them, building relationships is not a political act, but a critical part of professional development, and they continually take specific steps to enrich their networks. (p. 82)

From a productivity standpoint, organizations benefit by constructing social network maps because information flow and bottlenecks are seen. Bottlenecks could be caused because one person’s job has grown and the person still gets calls from his or her old contacts—taking time away from current priorities. The organization could streamline networks by making many people aware of a person’s expertise. This can create a conduit for information flow through a person who is equipped to handle it.

Social capital is “investment in social relations with expected returns in the marketplace” (Lin, 2001, p. 19). Inequity in social capital is manifested in two ways. First, differential investment means that groups or individuals are invested in differently. Second, institutions (policy, procedure, practice, and culture) and social structure differently award opportunity (to males over females for example) to build social capital (Lin, 2001). An ethics of responsibility and presence would require one to actively identify such inequities that restrict development of some to the benefit of others (Starratt, 2004).
Group Identity Salience

“Self-categorization theory suggests that, through the salience of in-group and out-group categorizations, an individual depersonalizes himself or herself such that being part of the in-group becomes part of the individual's identity” (Randel, 2002, p. 751). Is group identity salience a moderator of boundary spanning performance? Does a good boundary spanner hold tight group identity? Does level of identity salience reduce openness to other groups? A simple-minded sports example is of fans of opposing rival teams, say Ohio State University and the University of Michigan, many who are not even current students or alumni have such high group identity salience that they would fight over the mere presence of the other in “their” section. To take the example further, a person who meets someone in another company and realizes they are both big fans of the same sports team may spend much more time talking about things other than work, which is how personal connections are made. High group identity salience would give them instant kinship. If two people meet, but know the other is a fan of the opposing school, high group identity salience could keep them from thinking that they have anything else in common and, hence, they do not build a strong personal bond—for a while at least. If the two do not have high group identity salience, they could enjoy that each are sports fans and may develop a relationship on that common bond. In the academic environment, group identity salience could mean the difference between collaboration and individual toiling, between mentoring new faculty to ensure they reach tenure and keeping intact the power and status of the tenured, and between working as a team to identify and defeat unethical and unfair administrators and being individual cowards who are afraid to speak.

High group identity salience may allow one to understand his or her own group better and be able to represent the group while respecting other groups for their differences. It seems
dependent on need for salience—are we rewarded based on how only our team does compared to other teams, or are we all rewarded based on how well all teams do? Ironically, it seems that a person may depersonalize himself or herself to belong to a group because he or she is attracted to others in a group.

Summary

The environment facilitates boundary spanning in external leaders by facilitating opportunities and removing constraints. While self-efficacy, emotional intelligence, cognitive skill, and situation awareness are important to boundary spanning, they each rely on self-regulation as an overarching requirement (see Figure 4). Self-regulation is about (1) creating feedback loops between stimuli in the environment, (2) valuing that stimuli based on a reference, (3) identifying whether a change is needed, and (4) making a change to influence a move toward the preferred state. The reference used to value the current state is a concern to self-regulation and is a key to modeling behavior; poor references model poor behavior. It is important to help leaders value and select positive and appropriate models as reference. Cognitive skills are required to recognize, value, and process data in an efficient and effective manner. Situation awareness is required for boundary spanning to help an individual know who to contact when, and how. Situation awareness enables an individual to predict the outcome of an action considering the context and environment. Predicting the outcome helps the individual to plan strategic contacts. Emotional intelligence helps an individual to develop rapport and maintain contacts required for boundary spanning. Self-efficacy drives the motivation, or stick-to-it, that helps an individual continue to find, initiate, and maintain boundary spanning contacts in the face of challenge or adversity. Each of the four is interdependent and dependent on self-regulation.
Figure 4. Self-regulation as the moderator of boundary spanning.
CHAPTER III. QUANTITATIVE METHODOLOGY

In this chapter, I will present the methodology for the first phase of the mixed-methods study, which was correlational in nature.

This was a sequential exploratory mixed-method research design. The first phase was a correlational study to identify the relationship between two variables: external leader’s level of boundary spanning and external leader’s level of emotional intelligence. The second phase was a theory building case study. I conducted interviews to identify how external leaders use network resources and how such resources are utilized to help support teams; the focus was on identifying personal and organizational characteristics that facilitate and hinder the external leaders’ ability span boundaries and to lead teams.

Research Design for Phase I

The study design for Phase I was correlational because the intent was to explore the relationship between two variables. No direct manipulation of the variables occurred as the intent was not to determine cause and effect but to relate characteristics that were already evident. This research identified the relationship between boundary spanning (Druskat & Wheeler, 2003) and emotional intelligence (Goleman et al., 2002) in external leaders; I used a 360-degree tool to identify self and other scores.

Participants

The sample consisted of 118 participants: fifteen external leaders from two departments of a mid-size Midwestern university, each with a corresponding set of one superior and at least two members selected from reporting teams. The start of the project was a presentation to and discussion with the university’s Executive Vice President and her cabinet about the study. They
selected the two most appropriate and interested departments to participate in the study. The organization chart for the sample is presented in Figure 5.

*Figure 5. Organization chart for the study.*

The participants for Phase I were purposefully and conveniently selected by obtaining a list of all external leaders from two departments under the executive VP’s control. Each person associated with an external leader was asked for participation. The directors of each department and their reporting administrative assistants helped to recruit by introducing the study to their respective departments and by identifying all of the teams under their auspices.
A number system and key was developed to connect the superior and team members to the external leader. I gave the administrative assistants the key and set of envelopes with the specific numbers marked on the outside of the envelope. The number on each envelope was listed on the key along side of the name of the potential participant. To reduce the risk of exposing participant names, I only printed three keys; I had one and I gave both administrative assistants a copy and asked both not to share it with anyone. A numbered envelope was delivered to each potential participant identified by the directors. Each envelope included an Informed Consent form. Included, as Appendix D, is a copy of the Informed Consent that was sent to all team members identified by superiors.

Anyone who chose not to participate had his or her name removed from the list of potential participants. The department director or administrative assistants contacted participants three times via email to remind each about the study. The participants represented three major perspectives for the 360-degree evaluation: the external leader as the self, his or her direct superior, and participants from his or her reporting teams.

*Figure 6. Group set examples.*
I grouped participants according to the external leader whose behavior they described. Each participant group included the external leader, his or her superior, and members of reporting teams (see Figure 6). I numbered participants as sets such that for group 1, the external leader was a ‘self’ and was labeled els1, his or her team members were others and were labeled elo1, and his or her superior was an ‘other’ and ‘superior’ and was elo1s, and so on. For each group, the third letter designated a self or other, the number (1-40) represented the group number assigned in no order, and an “s” was added after the number if the participant was answering as a superior. The total number of external leaders who participated in this study was 18 (See Figure 5). The minimum for any team to be included in Phase I was four respondents; the external leader was only required as one of the four. The total number of participants for Phase I was 118. As expected, several superiors reported on more than one external leader. In such cases, if the superior was part of the group selected for interviews in Phase II, the superior interview was labeled according to the external leader participating in Phase II.

Instrumentation

The Team Leader Questionnaire (TLQ) and the Emotional Competence Inventory (ECI-2) were the assessment instruments used in this study. Permission to use the TLQ was granted by Vanessa Druskat and Jane Wheeler. Permission to use the ECI-2 was obtained from Steven Wolf, representing The Hay Group.

The last section of the assessment was a separate page requesting demographic information including age, gender, years of experience at the same job, years of experience in the industry, years of experience working with the related external leader. A sample demographic information page of the assessment package is included at the end of Appendix B, along with one copy of the survey.
Team Leader Questionnaire (TLQ)

The TLQ, adapted from Druskat and Wheeler (2003), was selected for two reasons. First, the TLQ was designed to measure boundary spanning through 360-degree feedback to find the “other,” which is essential to boundary spanning functions. To identify the relationship, the perspective of the others who recognize the relationship must be incorporated. The triangulation of multiple participants’ perceptions of the external leader functions and behaviors adds credibility to the results. Second, although the TLQ has not been widely used, it was based on findings of a significant study of behaviors of highly successful external leaders at a Fortune 500 durable goods manufacturer in the Midwest (Druskat & Wheeler, 2003).

Table 2

TLQ Clusters, Competencies, and Corresponding Questions

<table>
<thead>
<tr>
<th>BS Cluster and Competency</th>
<th>Corresponding Question Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self</td>
<td></td>
</tr>
<tr>
<td>External Boundary Management</td>
<td>1, 11, 12, 7, 19, 8, 2</td>
</tr>
<tr>
<td>Information Sharing</td>
<td>9, 25, 28</td>
</tr>
<tr>
<td>Developing the Team</td>
<td>29, 23, 10, 14, 31</td>
</tr>
<tr>
<td>Supporting Team Self-Direction</td>
<td>20, 26, 13, 27, 22, 4</td>
</tr>
<tr>
<td>Relationship Building</td>
<td>3, 5, 15, 21, 18</td>
</tr>
<tr>
<td>Performance Focus</td>
<td>17, 30, 16, 32, 6</td>
</tr>
<tr>
<td>Other</td>
<td></td>
</tr>
<tr>
<td>External Boundary Management</td>
<td>1, 11, 12, 7, 19, 8, 2</td>
</tr>
<tr>
<td>Information Sharing</td>
<td>9, 24, 27</td>
</tr>
<tr>
<td>Developing the Team</td>
<td>28, 23, 32, 10, 14, 30</td>
</tr>
</tbody>
</table>
The TLQ is arranged into six competencies: (1) building team trust in the leader, (2) empowering the team, (3) coaching, (4) persuading, (5) political awareness, and (6) seeking information in the broader organization. The external boundary spanning cluster measures one’s ability to work as a liaison between the teams, the organization, and beyond. This includes how and where to get information, understanding company policy, marketing for the team, and securing resources for the team (Druskat & Wheeler, 2003). The information sharing cluster assesses sharing information about the organization with the team and ties it to how the team fits into the organization. The developing the team cluster assesses encouraging and coaching behaviors. The supporting team self-direction cluster measures empowering and delegating behaviors. The relationship development cluster assesses listening, respecting, and helping behaviors. Finally, the performance focus cluster assesses problem solving, systems thinking, team building, and persuasion behaviors of the external leader. These items are measured by asking the external leader how often they exhibit behaviors that fit into the clusters, such as “Develop individual team member skills through one-on-one coaching.” A similar question is asked of the team member to identify their perception of how often the leader develops individual team member skills through one-on-one coaching. The important reason to get both is to (1) ensure that the leader’s behavior is accurately described and (2) identify the size difference in the perceptions.
The TLQ consists of 32 statements for non-team leaders and 38 statements for team leaders with regard to behaviors exhibited or knowledge demonstrated by the external leader. The external leader questionnaire uses statements that describe behavior or knowledge. The questionnaire uses a seven-point scale (1 is never and 7 is always); the external leader used the scale to represent how frequently he or she exhibits the behavior or demonstrates the knowledge described in the statement. The statements of the questionnaire are framed around the question “Given the opportunity, how frequently do you exhibit this behavior or demonstrate this knowledge?” Similarly, the team member, and supervisor versions of the TLQ are written in the third person.

The TLQ was tested for content validity by three people from the host university to identify any problems with questions and, more specifically, terms within the statements. Any issues identified were changed in a way that did not jeopardize the question, but made the statement more understandable within the university context.

The TLQ takes approximately ten minutes to complete. Again, this assessment was used as a 360-degree self and other measurement. Therefore, each external leader completed the TLQ based on his or her perception of his or her own behaviors. In addition, each external leader was assigned a group consisting of at least two team members and one superior completed the TLQ based on their perceptions of their respective external leader’s behavior. A sample self and other questionnaire are included in Appendices B and C.

*Emotional Competence Inventory (ECI)*

The ECI was selected for three reasons. First, it was designed for use by corporate researchers (Boyatzis & Sala, 2004; Wolff, 2005). Second, validity has been established through administration to over 200,000 participants. The authors are very well known and respected in
the field of emotional intelligence. Third, the scale is a 360-degree measurement. Because emotional intelligence measurements, like leaders and those willing to be led require a “self” and an “other,” data to identify the perspectives and alignment of self and other were needed. Triangulation of data sources adds to the validity and creates a more complete measure of EI within the context of the organization.

The ECI consists of 72 questions answered on a six-point Likert-type scale: 1 = Never; 2 = Rarely; 3 = Sometimes; 4 = Often; 5 = Consistently; and N/A = Don’t Know (Boyatzis & Sala, 2004). N/A was not calculated in the means; N/A was reported as a 0, and I deleted the score from the data set so that it did not count as an intended score. The ECI portion of the assessment takes approximately 20 minutes to complete. The ECI measures 25 competencies. These competencies are emotion-based, learned behaviors that contribute to effective work performance (Schumacher, 2005). Schumacher cited Boyatzis and Sala (2004) and Sala (2002) in suggesting that emotional intelligence is positively related to a leader’s work performance.

In past research, the reliability of the ECI in terms of Cronbach’s alphas for average item scores ranged from .54 (Conflict management) to .90 (Inspirational leadership), with an average of .82, for the “others” rating and .45 (Conflict management) to .77 (Inspirational leadership), with an average of .68, for the “self” ratings (Boyatzis & Sala, 2004). The ECI has been tested for construct, criterion, and content validity (Boyatzis & Sala, 2004).

The ECI is organized into four clusters: (1) Self-awareness, (2) Self-management, (3) Social awareness, and (4) Relationship management. Table 3 shows the cluster, competency, and corresponding question numbers for the ECI.
Table 3

*Emotional Intelligence Clusters, Competencies, and Corresponding Questions*

<table>
<thead>
<tr>
<th>EI Cluster and Competency</th>
<th>Corresponding Question Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Management</td>
<td>52, 10, 4, 12, 9, 30, 49, 69, *60, *37, 40, 24,</td>
</tr>
<tr>
<td></td>
<td>*66, 70, 56, 3, 2, 13, 57, 72, 44, 22, 47, 26</td>
</tr>
<tr>
<td>Social Awareness</td>
<td>23, 71, 19, 54, 39, 43, *51, 45, 17, 32, 46, 64</td>
</tr>
<tr>
<td>Relationship Management</td>
<td>35, 5, 41, 36, 28, 18, *63, 33, 38, 14, 8, 67, 34,</td>
</tr>
<tr>
<td></td>
<td>59, 42, 58, 25, 20, 29, 50, *61, 11, 7, 65</td>
</tr>
</tbody>
</table>

*Identifies a statement that is asked in a negative fashion and the numerical answer must be reversed for scoring. For example, 1 turns to 5 and vice versa, 4 turns to 2 and vice versa, and three stays the same.*

The self-awareness cluster assesses one’s ability to perceive, identify, understand, and utilize emotions (Boyatzis & Sala, 2004). This cluster contains three competencies: (1) emotional self-awareness, (2) accurate self-assessment, and (3) self-confidence (Boyatzis & Sala, 2004).

The self-management cluster assesses the ability to manage one’s disposition and resources (Boyatzis & Sala, 2004; Sala, 2002). This cluster contains six competencies: (1) emotional self-control, (2) transparency, (3) adaptability, (4) achievement orientation, (5) initiative, and (6) optimism (Boyatzis & Sala, 2004). The social awareness cluster assesses one’s ability to perceive others’ feelings and needs and manage relationships (Sala, 2002). This cluster contains three competencies: (1) empathy, (2) organizational awareness, and (3) service orientation (Wolff, S., 2005, Personal Communication). The relationship management cluster assesses one’s ability to influence others. This cluster contains six competencies: (1) developing others, (2)
inspirational leadership, (3) influence, (4) change catalyst, (5) conflict management, and (6) teamwork and collaboration (Boyatzis & Sala, 2004).

Procedures

Approval from the Human Subjects Review Board (HSRB) was granted prior to starting the study. After HSRB permission was granted, the survey was reviewed with the superiors of the external leaders to ensure appropriate language prior to the “official” data collection phase. Modifications were made, where appropriate, based on these reviews which add to the internal validity. I sent a request for participation to all people associated with an external leader who was identified by the superior.

Participants had to opt into the study by signing and faxing the informed consent letter and by completing the surveys to complete the 360-degree data for Phase I data collection. All participants had access to the Web and they were able to take the surveys at their convenience within a three-week time frame. The survey data were collected between February 3 and March 16, 2006.

The ECI-2 and TLQ are paper and pencil assessments that, for the convenience of the participants and access to a larger population, were combined and offered online. According to Mertler and Earley (2003, April), there are no significant changes to psychometric properties by offering the assessment online. The surveys were offered online only. Survey Monkey (www.surveymonkey.com last accessed 5-10-2006) was used to create the survey in a web-based format. When the participant completed the survey and clicked on the complete button, a “Thank You” exit screen was displayed and the data was exported as an Excel file that was imported into SPSS.
Data Analysis

Descriptive statistics including the means and standard deviations were used to summarize, organize, and identify consistent trends in the data. To address the quantitative research questions 1 (What is the correlation between boundary spanning and emotional intelligence?) and 2 (Which emotional intelligence cluster is most strongly related to which boundary spanning cluster?), correlation analyses were run. To address research question 3 (Can we predict boundary spanning proficiency from emotional intelligence?) and 4 (Which leaders are “better” boundary spanners than predicted based on emotional intelligence?), bivariate regression was run with EI as the predictor (x) and BS is the outcome (y).

Threats to Internal and External Validity

The correlational research design of this study had several primary weaknesses that influenced threats to both internal and external validity. First, the team member and team leader competencies were not likely to be equal among teams. I expected that the ITS teams would be very similar to ITS teams in industry because together they are a service support group for the organization; they help everyone else work. The ITS teams are in a non-academic department with a director, managers, and supervisors. The library teams are in an academic department with a Dean, Chair, administrative, and faculty members. I expected that the academic department external leaders would have lower scores for boundary spanning and emotional intelligence for two reasons. First, I did not believe that an academic unit would be as concerned with ensuring that the teams had everything they needed. I expected that the need for external resources would not be seen or expected from people supporting instructors. The tenure process appears to be a lone one and I believe that there is not much support to help ensure that individuals reach this milestone. The logic went that since there was little support, little need must have been
recognized and certainly not rewarded. Second, while faculty members are somehow measured on what they do as university citizens, the service work they do is as part of a different team, not the one with whom the faculty work on a day to day basis. These are two reasons I believe the university gets away from having to support the faculty—divide and conquer. Less has to be done to support individuals than for one or many groups. Demographic data were collected as part of the pre-selection and questionnaire, but it was difficult to quantify amount of experience and how it affects true performance of or for the team. The only requirement for participation was one year of experience, thus some had one year and others had twenty years of experience. To combat that threat, the study was looking at development teams. Therefore, a large part of performance, no matter whether a person was selected for a team based on a technical niche, was likely to be based on interpersonal communication and problem solving. The more interdependent the team members, the more successful the team will likely be beyond simple summation; interdependent team members create synergies that benefit the team (Farr-Wharton, 2003).

Second, alignment of “self” and “others” was a concern of internal validity. Essentially, one could think of a line as the zero point (see Figure 7). Regarding the scores of a 360-degree survey, the lower the score of divergence of both “self” and “others,” the closer to the same perceptions, which suggested a better representation of reality. Therefore, in a 360-degree survey, one would want to see alignment scores as close to zero as possible.
Further, although the participants were told that only aggregate results would be reported, not the individuals who reported, the fact that each participant had a workplace relationship with the external leader as a requirement of entering the participant pool presented a concern of truthful disclosure. The concern was greater for those who report to the external leaders than for superiors because of fear of repercussion.

Only project teams whose members have worked with the current external team leader for at least one year were included in the study. During the original participant and team identification, time in the team was a consideration of making it onto the list. Only superiors who have supported external leaders for at least one year were included as participants. The one-year rule was important because a new person would have enough information to make a good judgment of the external leader’s performance. Of all who agreed to participate, only those team members who report to work in groups of five to fifteen were considered for the study.
CHAPTER IV. QUALITATIVE METHODOLOGY

In this chapter, I explain my selection of qualitative research methodology, participants, instrumentation, my role as a research instrument, data collection, data analysis, research questions, and trustworthiness and ethical issues.

Research Design for Phase II

The research effort of this phase of the study was designed as exploratory theory building embedded multiple-case study. Out of Phase I, a set of three external leaders were selected because of their boundary spanning score that was and was not predicted based on their emotional intelligence scores. Case study was selected as the method of study because I was looking at the “how” and “why” which tend to be explanatory, a likely use for case study (Yin, 2003). Theory building was appropriate for the study because I was investigating boundary spanning of external leaders as focal points around whom I built cases, based on narrative accounts of team members, self-reports, and superiors. Through the data, I identified what individual and organizational characteristics facilitate and restrict boundary spanning of selected external leaders (de Vaus, 2001). Through the data, I also identified differences among these selected external leaders. I used multiple-case study design to add confidence to the findings. Looking at a range of similar and contrasting cases allowed me to ground individual cases within a context, which strengthened precision and validity of the findings (Miles & Huberman, 1994).

Although a case could be made for designing the study as a theory testing case study, based on identifying support for boundary spanning functions and behaviors of successful external leaders based on Druskat and Wheeler (2003), I preferred to identify how external leaders are able to span boundaries. I believe that identifying facilitators and restrictors of boundary spanning brought out the theories of Druskat and Wheeler, which did in essence test
theory. On the other hand, I believed that if I designed the study as theory testing, I would find the functions and behaviors of boundary spanners, but not necessarily those things that are important for (facilitate and restrict) boundary spanning. This study approached the concept of boundary spanning through personal accounts of how an external leader, superiors, and reporting team members perceive facilitators and restrictors important for boundary spanning. Further, as stated in Chapter 1, these case studies were used to prescribe conditions under which boundary spanning is more likely to lead to improvements to leading self-managed teams (de Vaus, 2001). This was an embedded study because I studied the external leaders within the organizational context—parts in terms of the whole. Choosing a qualitative design highlighted the importance of context and conditions of the interdependence of the team, external leader, superiors, and the organization and gives access to environments where researchers have limited access or control (Creswell, 1998; de Vaus, 2001). According to deVaus (2001), taking traits out of the context in which it occurs risks the missing the meaning of the occurrence.

Yin (2003) identified strengths of interviews as keeping the conversation focused on the research questions and a good way to identify perceptions of causal inferences of the participants. Yin identified possible weaknesses of interviews as biased due to poorly constructed questions, inaccurate recall by the participant and the researcher, and reflexivity—telling the interviewer what the participant thinks he or she wants to hear. Semi-structured interviews were conducted by me, in person, to capture the external leader’s, team members, and superior’s perceptions of the importance of boundary spanning behaviors to the success of the teams and how they could be facilitated. Interviews of superiors and team members lasted between 30 and 40 minutes each. Interviews with external leaders lasted between 40 and 50
minutes each. The interview narratives were be transcribed verbatim and inductively assessed (Boyatzis, 1998).

Semi-structured interview scripts were used as a guide to ensure consistent data collection (see Appendix E). Because the interviews were intended to draw out anecdotal stories of boundary spanning behaviors and the interviewees’ perception of facilitators or restrictors of these behaviors, only general questions were asked. The interview questions for leaders, team members, and superiors focused on the relating, scouting, persuading, and empowering. Participants were asked to provide in-depth anecdotal accounts of the behaviors associated with boundary spanning. Boyatzis (1998) called these in-depth anecdotes or step-by-step details critical incidents. Critical incident interviews enable the determination of individual characteristics and behaviors that impact boundary spanning performance (Weems-Landingham, 2004).

Interviews were conducted to identify participant perceptions and understanding of external leader roles and responsibilities to span boundaries, how boundary spanning affects the participant, and how the participant affects boundary spanning of the external leader. The questions to participants did not include the term boundary spanning, but were more specifically targeted toward the four competencies of boundary spanning.

The interview data gathered from superiors, external leaders, and team members lead me to a second interview with one external leader to dig further into aspects of the environment and her leadership style that were interesting and opened a new line of questions. I also learned many things about the organization about which I had no idea and needed to be brought out through another lens. The second interview with Jenny lasted approximately 45 minutes and the questions were more conversational in nature. I had developed a familiarity with the people and
organization that helped me to relate with Jenny, and allowed me to ask more specific questions. The questions were about the hierarchical relationship between the CIO and the leaders and team members at various levels of the department. Leader distance and leader need were also discussed as part of my analyses of all prior interviews.

Researcher as Instrument

As an interpersonal communication researcher, I have many intuitions and experiences as a development team member, team leader, and external team leader that lead to a host of research topics. My main interest was exploring successful external team leader’s perceptions of what personal and organizational characteristics facilitate and restrict their ability to support their teams through boundary spanning. Boundary spanning, I believe, is significantly moderated by a level of emotional intelligence; both boundary spanning and emotional intelligence are innate, but trainable, and I would like to be able to train on individual behaviors and prescribe the organizational environment to facilitate boundary spanning. There are, of course, many ways to explore both of these, and many topics within each to explore. I have an initial program of research mapped out based on my thoughts that I have started filling in with data.

Being a team member in consulting firms, many projects required meeting new people and working with many new (some interdepartmental) team members. I had little to no history (corporate memory) and had to rely on my personal external resources to be effective and efficient from the first day of engagement. I always felt that I was somehow able to move among groups (both internal and external to the client) unencumbered by the politics and preexisting structure that other team members experienced. Perhaps this was a learned feeling because the nature of consulting requires consultants to reach back to the consulting firm for resources to help push agendas of the client forward. Perhaps I was merely unaware. I have always felt it was
important and interesting to have a large network of people whom I could call on for advice or access to other resources. I did not consider these people mere social contacts; I utilized them as boundary spanning resources. My nature is to understand people’s interests, background, family, life experience to make as many connections with my own history as possible. My curiosity and willingness to ask many questions helps me to find connections. I also try whenever possible to connect my resources to one another in an attempt to create opportunity for each of them. I believe I can walk into almost any situation and have high self-efficacy about completing any task called for because of my extended network of resources that I have honed throughout my life. I do still have and utilize contacts that I have known for thirty years—I’m only 40. Clearly, I did not work at ten, but through school, sports, and my family friends, I had friends from many areas who happened to be in fairly large families. Keeping these connections over the years allowed me to grow connections within each family. Now that we are all grown, I have a very large network of friends I could call for help in a professional setting. Although most of these connections are not actively maintained, I do have several who happen to be in high places at various companies.

I have worked in the training field, directly or as support to consulting, with Fortune 500 companies for ten years and have not yet seen curriculum that includes boundary spanning for any level of management or employee. I will use this simplistic model as the chassis from which to hang context for needed research. There are a few main reasons for my research. First, research shows that highly successful external team leaders do display high level of boundary spanning behaviors (Druskat & Wheeler, 2003) and it would follow that those individuals who have effective network resources should have greater likelihood of having a high level of emotional intelligence. Second, if boundary spanning increases ability to successfully complete
projects, there would be positive effects on self- and collective-efficacy which do affect performance (Bandura, 1997b), then corporations should include building, utilizing, and maintaining boundary spanning as a course in management and leadership curriculum. Third, the capability and capacity of individuals to utilize resources external to the group is an efficient use of someone else’s resources. The work environment should do all it can to create an environment for meaningful network connections and, although it cannot force these connections, it can allow it more opportunity to happen, thus improving performance (Cross & Parker, 2004b).

From my perspective, what are lacking are (1) correlation analyses of boundary spanning and emotional intelligence and (2) a qualitative discussion of successful individuals’ experiences in boundary spanning. Examples of benefits of high quality boundary spanning include working on client projects with members of the client company for the synergy, corporate memory, and embeddedness; working as a consultant to the work team (e.g., bringing the experience and skills of the team member and her accessible network), allowing team members to work on individual niche tasks while allowing others with complementary expertise to help complete the task, market the team throughout the organization, act as a buffer from outside distractions, etc.

I developed this particular study to begin “chipping away” at my own model of a collaborative industry-and-education computer-based training development process while increasing the amount of qualitative research in team member and team leader boundary spanning. I decided to begin with the external team leaders for two reasons: (1) they directly affect many people (project team members)—a good cost ratio, and (2) they are often ignored in the literature regarding teams.

As a boundary spanner, I have ten years of experience in developing computer-based training and communication as a trainer, instructional designer, graphic artist, project manager,
and external project leader of internal and external (to the organization) teams. I have seen many projects go far over budget or miss the quality standard because team members and external leaders did not consult with others who could have offered expertise. I believe that people like to tell others what they know; I have always made it a point to take several of my key network contacts to lunch just to pick their brains and listen to their experiences. I have also introduced my contacts to allow more inclusive and synergistic conversations.

I have intellectual similarity to the all participants because I worked on many development teams and I was also responsible for high performance with little ramp-up time. My impatience for individuals whom I feel are not resourceful enough to reach out to external resources to complete a task made me aware of the need for boundary spanning training. I have worked through many organizational constraints that restricted boundary spanning.

As a resource and connector participating in other peoples’ networks, I am able to contact people in many industries; or likely know someone who does if needed.

As a researcher my goals are to identify what it is like to be a boundary spanning external leader paying attention to personal and organizational characteristics.

Participants

This study examined salient boundary spanning experiences of external leaders in an effort to identify those individual and organizational characteristics that facilitate and restrict boundary spanning as perceived by external leaders, their teams, and superiors. The participants for the second, qualitative, phase were purposefully selected through Phase I survey scores. External leaders who had unusual alignment scores for emotional intelligence and boundary spanning were selected as interview participants for Phase II. Alignment is important to 360-degree scales because it shows how consistent the external leader is in behavior. It also shows
how aware the leader is of his or her own behavior. It is the comparison proof “Do you see me as I see me?” Alignment was important for Phase II selection because three scores were initially interesting in that they were unusually aligned on EI, yet very different on BS. There was one person with nearly zero (perfect alignment) on both EI and BS, a second person who had an EI alignment score of nearly zero, but the self score was much higher on BS than the other score (rated himself much higher on BS than did the other), and a third person who also had very similar alignment on EI, but the self score was much lower than the other score (rated himself much lower on BS than did the other). I felt that these three would give an interesting snapshot of very different BS competence and behaviors while controlling for EI.

All potential participants were contacted initially by an email memo originating from the reporting superior. Where this yielded little response, it was followed up by personal emails and phone calls to establish a mutually convenient interview time. All interviews were completed during the participants’ work hours.

Data Collection and Analysis

Data collection was conducted through personal in-depth semi-structured interviews with each participant. This approach was used to understand the interdependent behaviors of project teams, external leaders, superiors and others who might be called by external leaders to help span the boundary between the team and the organization. Data collection began in February, 2006, and ended in April, 2006.

Content Analysis

I transcribed all interviews verbatim. Although there were some pauses in the transcripts due to not being able to make out every word, my transcribing had three benefits: recall, training, and context. Recall was important so that I could replay the conversations in my mind and hear
nuances that I missed during the interview. Training was an important advantage; I could use my questioning language and nuances to regulate what and how to question for future interviews. There were times when I could hear things that I did not like in the ways I asked some questions; the same question could be asked several different ways and, depending on the way, could be somewhat leading. I learned to be careful to ask questions in a more neutral manner. Context includes more than what was said. Because not every word was audible, my being the interviewer and transcriber allowed me to recall the context of the conversations and, in some cases, recall the missing word or gist of the statement. An outside transcriber would not have taken the time or known these context pieces. Transcripts were coded using the Data Analysis Code in Table 4.

Line-by-line analysis was done to identify, and become intimately familiar with, the nuances of interaction with the external leader and how he or she manages the boundary for the reporting teams.

I took running notes and compiled a summary of each to list specific themes described by participants. Each theme had associated supporting quotes linked. Behaviors were initially categorized into functional clusters: relating, scouting, persuading, and empowering. The second pass through the transcripts required additional coding for leader distance and need. Once functional clusters were created, the analysis turned to process orientation—when and how the functions were combined and how these differ among participants. Data were analyzed for sequence of interaction and behavior and how they differ based on perceptions of project success.
Intercoder Reliability

Three coders coded transcripts to determine coding reliability. Reliability and agreement was gained through in-depth discussions of transcripts and their meaning and context.

Code Development

I enlisted qualitative researchers to act as code readers. The code readers and I independently coded the interviews and then discussed the themes identified in the interview. A codebook was developed to identify emerging patterns, themes, and behaviors reported through the interviews that highlight differences including organizational and personal characteristics. The coded transcripts revealed a list of themes that differentiated facilitators and restrictors of boundary spanning as perceived by all participants. The intent was to identify and analyze stories where effective and ineffective boundary spanning behaviors were described within a context.

Table 4 shows the major codes for data analysis.

Table 4

<table>
<thead>
<tr>
<th>Code</th>
<th>Theme</th>
</tr>
</thead>
<tbody>
<tr>
<td>REL</td>
<td>Relating</td>
</tr>
<tr>
<td></td>
<td>• move back and forth between the team and the broader organization to build relationships</td>
</tr>
<tr>
<td></td>
<td>• socially and politically aware</td>
</tr>
<tr>
<td></td>
<td>• build team trust and care for team members</td>
</tr>
<tr>
<td>Code</td>
<td>Theme</td>
</tr>
<tr>
<td>------</td>
<td>-------</td>
</tr>
<tr>
<td>SCT</td>
<td>Scouting</td>
</tr>
<tr>
<td></td>
<td>• seeking information from managers, peers, and specialists</td>
</tr>
<tr>
<td></td>
<td>• diagnosing member behavior</td>
</tr>
<tr>
<td></td>
<td>investigating problems systematically</td>
</tr>
<tr>
<td>PER</td>
<td>Persuading</td>
</tr>
<tr>
<td></td>
<td>• obtain external support</td>
</tr>
<tr>
<td></td>
<td>• influence the team</td>
</tr>
<tr>
<td>EMP</td>
<td>Empowering</td>
</tr>
<tr>
<td></td>
<td>• delegate authority</td>
</tr>
<tr>
<td></td>
<td>• exercise flexibility regarding team decisions</td>
</tr>
<tr>
<td></td>
<td>• coach</td>
</tr>
</tbody>
</table>

Trustworthiness and Rapport Building

Qualitative research has been criticized for not adhering to the same validity standards that experimental research has established for true validity (LeCompte & Goetz, 1982). In an attempt to equalize and standardize qualitative validation to similar standard to quantitative validation, Lincoln and Guba (1985) started a list of qualitative terms to match equivalent quantitative terms (e.g., quantitative internal validity to qualitative credibility).

Trustworthiness is the qualitative equivalent of validity. According to Maxwell (2005), “validity is a goal rather than a product; it is never something that can be proven or taken for
granted” (p. 105). Therefore, because validity is not a state, the word “trustworthy” makes more intuitive sense as a measure of qualitative data. To me, trustworthiness encompasses reliability and validity. Trustworthiness requires an acceptance and application of design precautions and awareness of threats that could affect the truthfulness of data. The more awareness, acknowledgment, and precautions that are built into the design and acknowledged during analysis, the more trustworthy the data will be.

I made clear my expectation to interact with the data in the TLQ/ECI survey and as a statement as part of the request for participants. My goal was to ensure that all participants trusted that no personal information would be identifiable. This was particularly important because the interviews could affect future success of the external leaders. Likewise, those who reported to the external leaders had to believe that they would not be in jeopardy of losing their positions or rank because of answers or participation in the study.

According to Tashakkori and Teddlie (1998), one way to strengthen trustworthiness is through triangulation of data sources. The interview sets for this study were particularly strong because I used multiple people to collect data about the external leader; these people offered various perspectives and from various relationship points (e.g. superior, and team member). Triangulation allowed me to uncover various mental models at play among the relationships, which helped to discover different perspectives and realities of the participants. According to Senge (1999), everyone has and works with mental models; one needs to be aware of the model and the source of that model.

Bias includes threats to validity on the basis of (1) selection of data that fit the researcher’s preconceptions or existing theory and (2) selection of data that stand out to the researcher (Miles & Huberman, 1994). According to Maxwell (2005), qualitative research will
be more concerned with understanding how the researcher’s “lens” affects and interacts with the data than with eliminating any differences between researchers and the notions they bring to the study. Two procedural strategies combat this threat: the other coders worked as a check to my own bias and the fact that the other coders have no experience working in an IT environment will not allow me to make assumptions or make inferences based on my own experiences.

Stake (1995) suggested that case studies require extensive verification of contested description (not easily backed up by objective data). The two procedures Stake emphasizes are triangulation and member checking.

Bias was minimized in my study because I collected data from several people prior to analysis. The actual data from many views reduced my ability to make jumps in reason to suit my preferences or expectations. Although I believe that the boundary spanning functions of external leaders, as found by Druskat and Wheeler (2003), make good sense based on my personal experiences, I was ultimately looking for those things that facilitate and restrict boundary spanning, not valuing whether the external leader is a good boundary spanner.

As a researcher, it was my job to ensure that each participant had a voice in the data. The ethic of care required that I attend to what the participants said within their own context-as a peer, reporting team member, superior, or external leader, within the organization as it was perceived by each participant (Mayeroff, 1995). My personal integrity was at stake with the collection, analysis, and reporting of all data in this study. My ability to maintain relationships with the participants for any further research also rested in my ability to portray all data in a fair, honest way that allowed the organization to create organizational and individual plans around the results to facilitate effective boundary spanning.
Thick description allows the reader to identify with the information and context to decide on the transferability (Lincoln & Guba, 1985; Merriam, 1988). As with leadership being in the eye of the follower, transferability in case study is based on the ability and willingness of the reader to apply the findings to his or her situation (Creswell, 1998). The leader has to create the context and vision for others to want to work toward a common goal (Schein, 1992).

Researcher bias and interactivity are threats to external validity in that the experiences, bias, and attitudes toward the subject and participants are part of the analysis. The fact that participants were “in the spotlight” may have affected the data. Just as initial addition of video into a classroom creates different behaviors (Alessi & Trollip, 2001) temporarily, the fact that a group is studied may make behaviors change. The cases studies that I conducted were truly cross-sections of time. Each of the participants had to look back into his or her experiences to construct answers about the external leader’s boundary spanning behaviors and those things that help and hurt boundary spanning. The short engagement was somewhat offset by the number of participants reporting on one person’s self-description.

Among the threats I considered to be greatest to trustworthiness were short engagement, no objective performance data, perceptions of how to work as a boundary spanning external leader, and non-anonymous interviews. Building rapport was one critical component to collecting thick data that could compensate for part of the threats. There were many layers of information held by participants (Glesne, 1999), the more rapport I built, the deeper the layers of information were offered.

The fact that participants work directly with the external leader they were discussing naturally created pause in the amount of disclosure. Likewise, the external leader may have checked language to describe things that restricted his or her boundary spanning because it may
call attention to behaviors of the superior. The fact was that all of the participants had to work together; this study was not an exercise in identifying roadblocks and creating wounds, it was ultimately to identify good processes and individual strengths that enable more effective self-managed teams. There was little I can do to build significant rapport in a short time prior to the interviews; I was transparent with my intent and honest about how the data would be used and reported. I started to build trust in the initial request for participants where I set out the purpose of the study. The fact that it would come from the superior with a request for candor may have helped to put people at ease.

Although rapport in the sense of this study looked at the relationship between me and the interviewee, I suspected that a greater rapport would be built within and among the sets of participants. They realized the intent of boundary spanning and how it fits into the overall goal of helping the self-managed teams.

This research would benefit the department and the university as a whole. By researching boundary spanning and understanding it within the context of an IT department and within the university, people within the two would be able to identify similarities with their situations and make changes to take advantage of the research findings.

Voice will be one way in which the participants benefited. By doing 360-degree interviews, each was able to understand the perspectives of the others regarding boundary spanning. Several aspects of boundary spanning behaviors may show differently depending upon the person or position context in which it was perceived. Sharing these perspectives gave each an understanding of truths within context (Creswell, 1998). In other words, the new perspective allowed one to experience the other within the context of decision making and did not judge based on original assumption. For example, the external leader was in a precarious position
regarding empowerment. The team members may prefer more autonomy from the external leader and the superior of the external leader may prefer that the external leader exert more control over the teams. Druskat and Wheeler (2003) found this to be the case. The external leader must make any decision with these in mind.

I do not believe I offered any threat to participants. I understand, however, that I walked in with the understanding that I was doing research as part of my dissertation. It was possible that I was judged by the participants and may have had information withheld due the participants not wanting to sound uninformed in front of me or, at some point, in front of whomever sees the data in whatever form.

Early in the interview process, I felt like I was not getting enough rich data back. I did not know whether I was asking the correct question, or whether I was not asking them correctly. A couple of the initial interviewees were not very forthcoming with long answers beyond specifically what I was asking. Perhaps I was a boring interviewer, sticking to my questions in a mechanical manner that did not make them feel like I wanted elaboration; therefore, they put back what I sent out. As the interviews went on, the answers seemed to include much more detail regarding relationships and personal beliefs. Maybe the interviewees happened to be more outgoing toward the middle of the schedule; maybe I became more comfortable that I was asking the questions in a better way. In either case, the combination of my comfort asking the questions and my developing understanding of the department and the relationships within clearly changed my ability to draw information from the participants. Looking back on the experience, and trying to put myself in their place, if someone had come to me for an interview and seemed somewhat unsure of questions and interview techniques, I likely would not have engaged to the same level as I would have if the interviewer seemed very competent and confident. I believe that my ability
to ask about specific relationships and to show that I did have some understanding of the politics allowed me to project an interest in the interviewee, beyond the questions on my sheet.

In order to build the trust of the participants to speak freely, I had to build rapport with each person. This involved discussions about the best and worse things about the participant’s job. One of the most important aspects of this trusting relationship was my ability to make the participants understand that I was making judgments and that we were equal in these discussions; Creswell (1998) calls this sacredness.
CHAPTER V. QUANTITATIVE RESULTS

The purpose of Phase I of this study was to examine the relationship between emotional intelligence and boundary spanning of external team leaders. This chapter includes descriptive information from the sample with respect to demographics and response rate as well as results for research questions 1-4 (of the regression and correlation analysis). These results defined the selection of case study participants for Phase II.

Participants

I selected participants for this study through a convenience sampling method. The sample included 173 full-time university employees from two departments: 51 from an academic department (Library) and 122 from a non-academic area (Information Technology Services (ITS)). To participate in the study, the self and others had to be a group for at least one year. There were 118 respondents who participated in Phase I of the study by completing the online survey. Table 5 illustrates the participant team make-up. External leaders completed more than one survey: as an external leader, as a team member, and some as a superior. They were counted each time they completed survey. The responses included 16 external leaders (self) and 122 “others,” which include 104 team members and 18 superiors. This includes one external leader who responded, without any response from his team.
Table 5

Summary of Team Size and Participation

<table>
<thead>
<tr>
<th>Team</th>
<th>External Leader Responded</th>
<th>Superior Responded</th>
<th>Total Team Members</th>
<th>Team Members Responded</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jenny*</td>
<td>✓</td>
<td>✓</td>
<td>6</td>
<td>6</td>
</tr>
<tr>
<td>Buzz</td>
<td>✓</td>
<td>✓</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>Jenny*</td>
<td>✓</td>
<td>✓</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Morgan</td>
<td>✓</td>
<td>✓</td>
<td>8</td>
<td>4</td>
</tr>
<tr>
<td>Mae</td>
<td></td>
<td>✓</td>
<td>16</td>
<td>4</td>
</tr>
<tr>
<td>Sam</td>
<td>✓</td>
<td>✓</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Maria</td>
<td>✓</td>
<td>✓</td>
<td>6</td>
<td>2</td>
</tr>
<tr>
<td>Mitch</td>
<td>✓</td>
<td>✓</td>
<td>11</td>
<td>8</td>
</tr>
<tr>
<td>Nick</td>
<td></td>
<td></td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>Manfred</td>
<td>✓</td>
<td>✓</td>
<td>12</td>
<td>8</td>
</tr>
<tr>
<td>Ryan</td>
<td>✓</td>
<td></td>
<td>7</td>
<td>8</td>
</tr>
<tr>
<td>Sid</td>
<td></td>
<td>✓</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Diego</td>
<td>✓</td>
<td>✓</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>John</td>
<td></td>
<td>✓</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>Woody</td>
<td>✓</td>
<td>✓</td>
<td>2</td>
<td>0</td>
</tr>
<tr>
<td>Joan</td>
<td>✓</td>
<td></td>
<td>10</td>
<td>6</td>
</tr>
<tr>
<td>Team</td>
<td>External Leader Responded</td>
<td>Superior Responded</td>
<td>Total Team Members</td>
<td>Team Members Responded</td>
</tr>
<tr>
<td>--------</td>
<td>---------------------------</td>
<td>--------------------</td>
<td>--------------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Rachel</td>
<td>✓</td>
<td>✓</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Lucy</td>
<td>✓</td>
<td>✓</td>
<td>7</td>
<td>4</td>
</tr>
<tr>
<td>Evelyn</td>
<td>✓</td>
<td>✓</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>Bonnie</td>
<td>—</td>
<td>✓</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Ellen</td>
<td>✓</td>
<td>✓</td>
<td>7</td>
<td>3</td>
</tr>
</tbody>
</table>

* Denotes the external leader is the same for both teams.

Note: Table 5 does not show the seven teams that had no participants.

The team name was only significant to me so that I could keep the leader associated with the appropriate superior and team member responses. The number had no significance other than to help me quickly identify library teams. The dean of the libraries made no request to team leaders or members to participate in the study; she only discussed it with the staff during a department meeting. The CIO of ITS was much more active at personally helping me to recruit participants. Although the informed consent included statements about being free not to participate and that they had to opt in, as opposed to having to opt out, the response rate was so much higher than I expected that I felt compelled to ask some participants why they participated. The response was the same; it was political and the CIO wanted participation. The CIO has an MBA and may never have conducted research that required HSRB training or approval and, therefore, did not understand the purposeful wording of the informed consent and the spirit of being fully free to or not to participate.
Descriptive Statistics

In addition to completing demographic questions, each participant completed the Emotional Competence Inventory (ECI) and Team Leader Questionnaire (TLQ) on behalf of his or her respective external team leader. Some superiors completed the ECI and TLQ on behalf of multiple external team leaders. Some external leaders completed the ECI and TLQ as the ‘self’ who works with multiple teams. Thirty external leaders were asked to participate, but only fifteen were included because they completed the survey and they had at least three others complete the survey on their behalf. The libraries had five external leaders who said “no” to participation on behalf of their teams.

One external leader (Nick) did not participate, yet his entire team opted to participate. Unfortunately, without a self and other, alignment could not be established; therefore, the team could not be included. This response scenario was unusual from a business perspective because thirty minutes of time from 22 people seems expensive—time and money wise. I was told that the external leader of this team was reminded and that he did complete the survey, but SurveyMonkey showed no history of any response from Nick. Even if he had started a survey and exited, some response would have been recorded. After several attempts to request participation and postponing the analyses for two weeks, I decided he really did not want to participate and closed the survey.

There is a high degree of internal consistency across the scales for each instrument. Table 6 shows the Cronbach’s alpha values for each cluster for the ECI and TLQ. The Seeking Information in the Broader Organization cluster only had one question, so it had no internal consistency measure. Relationship Management had the highest reliability for any cluster in the two instruments.
Table 6

Reliability Analysis of Constructs

<table>
<thead>
<tr>
<th>Constructs</th>
<th>Indicator Variables (Items)</th>
<th>Cronbach’s Alphas</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ECI</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self Awareness</td>
<td>12</td>
<td>.81</td>
</tr>
<tr>
<td>Self Management</td>
<td>24</td>
<td>.84</td>
</tr>
<tr>
<td>Social Awareness</td>
<td>12</td>
<td>.79</td>
</tr>
<tr>
<td>Relationship Management</td>
<td>24</td>
<td>.92</td>
</tr>
<tr>
<td><strong>TLQ</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building Team Trust in the Leader</td>
<td>5</td>
<td>.89</td>
</tr>
<tr>
<td>Empowering the Team</td>
<td>8</td>
<td>.82</td>
</tr>
<tr>
<td>Coaching</td>
<td>7</td>
<td>.89</td>
</tr>
<tr>
<td>Persuading</td>
<td>3</td>
<td>.79</td>
</tr>
<tr>
<td>Political Awareness</td>
<td>8</td>
<td>.82</td>
</tr>
<tr>
<td>Seeking Information in the Broader Organization</td>
<td>1</td>
<td>*</td>
</tr>
</tbody>
</table>

* Reliability can not be established using only one item.

The ECI consisted of 73 statements asking the participants to answer questions using a 5-point Likert scale (1- Never shown, 2- Rarely shown, 3- Sometimes shown, 4- Often shown, and 5- Consistently shown). The 73 questions represent 18 competencies and the competencies are grouped under four clusters. The four clusters—self-awareness, self-management, social awareness, and relationship management—collectively measure one’s overall emotional
intelligence. Table 7 shows the means and standard deviations of self and other scores for the ECI scale. Overall, participants rated the external leaders’ EI at or near the “often shown” level. Both self and others scored highest on social awareness, yet lowest on relationship management. Both self and others also scored higher on self-awareness than on self-management.

Table 7

*Descriptive Statistics for Emotional Intelligence Clusters (Self and Other)*

<table>
<thead>
<tr>
<th>Variable</th>
<th>Self (n=15)</th>
<th>Other (n=103)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mean (5-point scale)</td>
<td>Standard Deviation</td>
</tr>
<tr>
<td>Self-Awareness</td>
<td>4.11</td>
<td>0.402</td>
</tr>
<tr>
<td>Self-Management</td>
<td>4.04</td>
<td>0.310</td>
</tr>
<tr>
<td>Social Awareness</td>
<td>4.34</td>
<td>0.259</td>
</tr>
<tr>
<td>Relationship Management</td>
<td>3.92</td>
<td>0.426</td>
</tr>
<tr>
<td>Overall EI</td>
<td>4.11</td>
<td>0.180</td>
</tr>
</tbody>
</table>

“Other” Statistics: While 103 superiors and team members participated, for statistical purposes, their scores were calculated and averaged for each external leader (and then the means for each leader’s team were averaged to obtain the “Others” scores). Hence, means for “others” are means of means.

The TLQ consisted of 32 statements asking the participants to answer using a Likert-like scale (1- Never, 2- Rarely, 3- Infrequently, 4- Neutral, 5- Fairly Often, 6- Frequently, 7- Always). The questions represent six competencies that are grouped under four clusters: relating, scouting, persuading, and empowering. The competencies collectively measure the external leader’s overall boundary spanning competence. Table 8 shows the means and standard deviations of self and other scores for the TLQ scale for each of the six competencies. In both Building Team Trust and Persuading, the self score was higher than the other scores. Overall,
participants rated external leaders, both self and other, as high in boundary spanning competencies, with averages at or near the “frequently” level. Building Team Trust had the highest self score while Seeking Information in the Broader Organization had the highest other score. The self scores of both Persuading and Seeking Information in the Broader Organization had the highest standard deviations.

Table 8

Descriptive Statistics for Boundary Spanning Competencies (Self and Other)

<table>
<thead>
<tr>
<th>Variable</th>
<th>Self Scores (n = 15)</th>
<th>Other Scores (n = 103 )</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Mean (7-point scale)</td>
<td>Standard Deviation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building Team Trust in the Leader</td>
<td>5.85</td>
<td>0.661</td>
</tr>
<tr>
<td>Empowering the Team</td>
<td>5.73</td>
<td>0.472</td>
</tr>
<tr>
<td>Coaching</td>
<td>5.52</td>
<td>0.690</td>
</tr>
<tr>
<td>Persuading</td>
<td>5.44</td>
<td>0.869</td>
</tr>
<tr>
<td>Political Awareness</td>
<td>5.65</td>
<td>0.592</td>
</tr>
<tr>
<td>Seeking Information in the Broader Organization</td>
<td>5.80</td>
<td>0.862</td>
</tr>
<tr>
<td>Overall TLQ</td>
<td>5.67</td>
<td>0.526</td>
</tr>
</tbody>
</table>

“Other” Statistics: While 103 superiors and team members participated, for statistical purposes, their scores were calculated and averaged for each external leader (and then the means for each leader’s team were averaged to obtain the “Others” scores). Hence, means for “others” are means of means.

Alignment refers to the difference in scores between the self and aggregated other score. The closer the score is to zero, the more alignment; the more alignment, the more the self sees
what the others see. A positive alignment score means that the leader rated himself or herself higher than the other rated him or her. A negative alignment score means that the leader rated himself or herself lower than the other rated him or her. Tables 9 and 10 illustrate each variable (overall EI and EI clusters and overall TLQ and TLQ competencies, respectively) in terms of alignment between self and other scores. Alignment scores were calculated by taking the self score for that cluster and subtracting the aggregated other scores for that cluster.

Relationship Management Alignment is the only positive mean score for EI and Building Team Trust in the Leader is the only positive mean score for BS. All the EI scores are very close to zero, which means high self and other alignment. The alignment scores of the EI clusters are all lower than the mean scores of the BS competencies (whether the scores are negative or positive), meaning the EI clusters have higher alignment than the BS clusters. The boundary spanning alignment mean score for Persuading falls in the middle of the range of scores; it has a larger standard deviation than any other score.
Table 9

*Descriptive Statistics for Emotional Intelligence (Predictor) Alignment of Self and Other (n=118)*

<table>
<thead>
<tr>
<th>Variable</th>
<th>Mean Alignment</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall EI Alignment</td>
<td>-0.01</td>
<td>0.860</td>
</tr>
<tr>
<td>Self-Awareness Alignment</td>
<td>-0.03</td>
<td>0.544</td>
</tr>
<tr>
<td>Self-Management Alignment</td>
<td>-0.04</td>
<td>0.408</td>
</tr>
<tr>
<td>Social Awareness Alignment</td>
<td>-0.05</td>
<td>0.377</td>
</tr>
<tr>
<td>Relationship Management Alignment</td>
<td>0.08</td>
<td>0.556</td>
</tr>
</tbody>
</table>

Table 10

*Descriptive Statistics for Boundary Spanning (Outcome) Alignment of Self and Other (n=118)*

<table>
<thead>
<tr>
<th>Variable</th>
<th>Mean Alignment</th>
<th>Standard Deviation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall TLQ Alignment</td>
<td>-0.12</td>
<td>0.810</td>
</tr>
<tr>
<td>Building Team Trust in the Leader</td>
<td>0.26</td>
<td>0.961</td>
</tr>
<tr>
<td>Empowering the Team</td>
<td>-0.09</td>
<td>0.847</td>
</tr>
<tr>
<td>Coaching</td>
<td>-0.20</td>
<td>0.864</td>
</tr>
<tr>
<td>Persuading</td>
<td>-0.14</td>
<td>1.456</td>
</tr>
<tr>
<td>Political Awareness</td>
<td>-0.11</td>
<td>0.904</td>
</tr>
<tr>
<td>Seeking Information in the Broader Organization</td>
<td>-0.42</td>
<td>0.869</td>
</tr>
</tbody>
</table>
Table 11 shows the alignment scores for both EI and BS for each external leader. Although Phase I was conducted only to identify whether a relationship exists and to identify the participants for Phase II, there were a few noteworthy scores; the two furthest top right in Figure 8 are the CIO (0.68, 1.10) and one of his direct reports (0.68, 0.89), they represent Ryan and Morgan on the organization chart in Figure 9. Each scored himself much higher than did his team. In fact, the “other” scores for either Ryan or Morgan on the EI scale never averaged at or above 4 while Jenny had no average of “other” that was under 4.2. In Figure 8, the regression line shows that three scores were very similar in alignment of EI, yet very different in alignment of BS. The similarity across three of the external leaders’ (Mitch, Jenny, and Sam) EI alignment scores made an easy selection of participants for Phase II; facilitators and restrictors of boundary spanning require learning about why leaders score differently on BS when their EI scores are so similar.
**Table 11**

*Alignment scores for emotional intelligence and boundary spanning*

<table>
<thead>
<tr>
<th>External Leader</th>
<th>EI Alignment (x-axis)</th>
<th>BS Alignment (y-axis)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jenny*</td>
<td>-0.37</td>
<td>-0.16</td>
</tr>
<tr>
<td>Buzz</td>
<td>0.31</td>
<td>0.38</td>
</tr>
<tr>
<td>Jenny</td>
<td>-0.00</td>
<td>-0.22</td>
</tr>
<tr>
<td>Morgan</td>
<td>0.68</td>
<td>0.89</td>
</tr>
<tr>
<td>Sam</td>
<td>-0.09</td>
<td>-0.81</td>
</tr>
<tr>
<td>Maria*</td>
<td>-0.29</td>
<td>-0.05</td>
</tr>
<tr>
<td>Mitch*</td>
<td>0.04</td>
<td>0.63</td>
</tr>
<tr>
<td>Manfred</td>
<td>-0.27</td>
<td>-0.79</td>
</tr>
<tr>
<td>Ryan*</td>
<td>0.68</td>
<td>1.10</td>
</tr>
<tr>
<td>Diego</td>
<td>-0.42</td>
<td>-1.30</td>
</tr>
<tr>
<td>Sid*</td>
<td>0.59</td>
<td>1.05</td>
</tr>
<tr>
<td>Rachel</td>
<td>-0.35</td>
<td>-1.21</td>
</tr>
<tr>
<td>Lucy*</td>
<td>-0.25</td>
<td>-0.33</td>
</tr>
<tr>
<td>Evelyn</td>
<td>0.55</td>
<td>0.36</td>
</tr>
<tr>
<td>Ellen*</td>
<td>-0.61</td>
<td>-0.77</td>
</tr>
</tbody>
</table>

*Note: alignment scores are calculated by subtracting the aggregate other from the self score. A positive score means that the external leader ranked himself or herself higher than did the other. A negative score means the external leader ranked himself or herself lower than did the other. * External leaders who scored higher on BS than predicted from EI.
Correlational and Predictive Analysis

Question 1. What is the correlation between boundary spanning and emotional intelligence?

The correlation coefficient for the data revealed that emotional intelligence and boundary spanning are strongly related, $r = +.859$. The coefficient of determination ($r^2 = .738$, meaning that 74% of the variance in BS score can be predicted from EI.

Question 2. Which emotional intelligence cluster is most strongly related to which boundary spanning cluster?
The correlations between the constructs are significant. The correlations were run two ways. First, since the intent of the TLQ was to identify multiple constructs, the correlation was run with six boundary spanning competencies (see Table 12). Second, factor analysis (see Appendix H) revealed a one-factor loading, so it appears that boundary spanning could be a single construct; BS as a single construct was therefore run with the four clusters of EI (see Table 13).
Table 12

*Correlation Matrix: Boundary Spanning Competencies*

<table>
<thead>
<tr>
<th></th>
<th>Self-Awareness</th>
<th>Self-Management</th>
<th>Social Awareness</th>
<th>Relationship Management</th>
<th>Building Team Trust</th>
<th>Empowering</th>
<th>Coaching</th>
<th>Persuading</th>
<th>Political Awareness</th>
<th>Seeking Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-Awareness</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-Management</td>
<td>0.882</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Awareness</td>
<td>0.718</td>
<td>0.779</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship Management</td>
<td>0.836</td>
<td>0.810</td>
<td>0.880</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Building Team Trust</td>
<td>0.710</td>
<td>0.706</td>
<td>0.686</td>
<td>0.773</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Empowering</td>
<td>0.732</td>
<td>0.783</td>
<td>0.848</td>
<td>0.904</td>
<td>0.916</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coaching</td>
<td>0.658</td>
<td>0.736</td>
<td>0.738</td>
<td>0.785</td>
<td>0.777</td>
<td>0.821</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Persuading</td>
<td>0.657</td>
<td>0.847</td>
<td>0.499</td>
<td>0.578</td>
<td>0.452</td>
<td>0.538</td>
<td>0.560</td>
<td>1.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Political Awareness</td>
<td>0.710</td>
<td>0.850</td>
<td>0.754</td>
<td>0.817</td>
<td>0.893</td>
<td>0.908</td>
<td>0.812</td>
<td>0.715</td>
<td>1.000</td>
<td></td>
</tr>
<tr>
<td>Seeking Information</td>
<td>0.305</td>
<td>0.445</td>
<td>0.478</td>
<td>0.405</td>
<td>0.408</td>
<td>0.457</td>
<td>0.504</td>
<td>0.285</td>
<td>0.442</td>
<td>1.000</td>
</tr>
</tbody>
</table>

*Note: Italicized variables are boundary spanning competencies.*
Table 13.

**Correlation Matrix: EI Clusters and BS as a Single Construct.**

<table>
<thead>
<tr>
<th></th>
<th>Self-awareness</th>
<th>Self-management</th>
<th>Social Awareness</th>
<th>Relationship Management</th>
<th>Boundary Spanning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Self-awareness</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Self-management</td>
<td>0.882</td>
<td>1.000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Social Awareness</td>
<td>0.718</td>
<td>0.779</td>
<td>1.000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Relationship</td>
<td>0.836</td>
<td>0.810</td>
<td>0.880</td>
<td>1.000</td>
<td></td>
</tr>
<tr>
<td>Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boundary</td>
<td>0.715</td>
<td>0.850</td>
<td>0.805</td>
<td>0.844</td>
<td>1.000</td>
</tr>
<tr>
<td>Spanning</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Overall BS correlates most strongly with self-management (0.850). This is interesting, considering in chapters 1 and 2, I suggested that Social Awareness and Relationship management were the two biggest inspirations for this research question, thinking that they would be the most closely related to BS. The lowest EI score with overall BS is Self-awareness (0.715).

**Question 3. Can we predict boundary spanning proficiency from emotional intelligence?**

Boundary spanning can be predicted by emotional intelligence. Regression analysis showed that one can predict overall boundary spanning proficiency from emotional intelligence (F(1,13)=36.66, p<.0001). There is a positive relationship between EI and BS as shown in the scatterplot. The correlation is positive because increases in EI are generally followed by increases in BS. The spread around the regression line is also fairly narrow, which would lead to an expected .80 to .90 correlation.
Question 4. Which leaders are “better” boundary spanners than predicted based on emotional intelligence?

The external leaders who scored higher on boundary spanning than predicted from the emotional intelligence scores (see Figure 8) were: Jenny, Maria, Mitch, Ryan, Sid, Lucy, and Ellen. Table 11 shows the alignment scores of each of these external leaders.

Summary

Quantitative results show a strong positive relationship between BS and EI. The strong relationship led to prediction with moderate amount of prediction errors. Additional analysis indicated that TLQ may only be analyzing one construct and, therefore, may not be able to identify strongest which EI cluster is most strongly related to which BS competency. Those results are preliminary, as the TLQ is still being developed. More reliability and validity studies need to be conducted.

It is important to note that whether an external leader’s self score was higher or lower than the other does not mean that the leader is more or less effective. The quantitative portion of this study is by no means a full look at the complex relationship of the leader and the team member or team as a whole. In fact my appreciation for these alignment scores is that, even though leader distance and need are not considered in the TLQ, both need and leader distance may moderate the perceived effectiveness of the external leader’s ability to span the boundary between the team and organization. This is only a snapshot of the similarity of perception between self and others regarding two variables that affect the external leader. The next three chapters explore boundary spanning through a deeper, qualitative analysis of the organization’s hierarchy and social structure, and of three team leaders with nearly 0 EI alignment whose BS alignment scores vary from -0.81 to 0.63.
CHAPTER VI. PARTICIPANTS AND HIERARCHICAL CONTEXT

Participants

The case study participant selection was done using the scatter plot report generated from scores in Phase I (Figure 8). The surveys utilize a 360-degree feedback. For each team, alignment scores for both the superior and team members were calculated by averaging the scores and then subtracting that average other from the self score. For the purpose of this study, “other” refers to the aggregate mean scores of team and supervisor. Looking at the regression line on the scatter plot, the scores at the top right quadrant show that the external leader scored himself or herself higher on both emotional intelligence and boundary spanning than the other did. The scores at the bottom left quadrant are such that the external leader scored himself of herself lower on both measures than did the other. There were several boundary spanning scores that were higher than predicted based on the emotional intelligence score, but a decision was made to look at individuals with similarly aligned emotional intelligence and different boundary spanning scores. The three leaders were selected because it was important to identify what about the leaders created such a difference in boundary spanning scores when there is such a strong correlation between EI and BS. The alignment scores of the selected participants are circled on Figure 8 for Mitch (0.04, 0.63), Jenny (-0.00, -0.22), and Sam (-0.09, -0.81).

There were a few noteworthy scores; the two furthest top right are Ryan (the CIO) (0.68, 1.10) and Morgan (0.68, .89). Each scored himself much higher on both the ECI and TLQ than did the other. In fact, the “other” scores for either Ryan or Morgan on any cluster of the EI scale never reached 4 out of 5 while Jenny had no average of “other” below 4.2.

Participant scores did not cluster by department. I could not tell who entered what score or who from any team completed the online questionnaire; in some cases it was clear who
completed the survey for teams that had 100% participation. The external leaders were not told how many people reported on their behalf. For each of the three selected external leaders, five interviews were conducted: the external leader, the superior, and three team members. The three team member interviewees were randomly selected from each team. Only those members who returned a signed informed consent form were eligible to be interviewed. This was the only way to ensure that the person interviewed completed the online survey. One team member who reports to Mitch returned a signed informed consent form, but refused to be interviewed. The person was not comfortable being interviewed about the leader, so I randomly selected another.

Hierarchical Context

Individual case studies cannot be described until one has some situational appreciation of the context in which these cases work. In this section, I will describe the official hierarchical structure. After the structure is established, Chapter VII will move into individual composites of the three selected external leaders. Finally, in Chapter VIII, I will describe the social structure and how it changes the look of the hierarchy.

A blanket statement needs to be made that this is a very proud department from the perspectives of all participants. I spoke with people at each level, and all seem to be very competent and confident. Typical statements regarding the team members and the management team are “they work together in a way to look out for each other,” “We all have different skill levels and strengths. Sam knows that and delegates depending on your strengths,” and “the thing about our group is that we’re a very open group; we collaborate a lot.” I believe they are in a very high-performing group and they know it. A strong thread of pride and belonging runs through and among the hierarchical levels. I did notice that all but one person whom I interviewed seemed to be not only very personable, but also welcoming and outgoing. I may not
have noticed this if not for the stark contrast when compared to the others with whom I have spoken. I spoke with two others who stuck to answering only what was asked with little elaboration unless specifically probed with a statement like “Tell me more about…” or “How does … happen?” They were friendly enough, but not as talkative.

Although there has been an upward shift in one line of people, there seems to be very little turnover in the department. Perhaps that is partially due to economic conditions that have reduced the value of ‘computer people’ and company-hopping has slowed; but I suspect that members of this department really like what they do and how they are allowed to do it. Only one participant mentioned that the pay was not quite as good at the university as it might be in industry. In describing the inability to remove one person from the team for poor performance, a team member said it was because it “is a ‘state’ job.” There seems to be some sense of job security for people working at the university that appeals to some people at the expense of financial compensation.

Figure 9 shows the general layout and levels of part of the ITS department—where the study has developed its focus. The top circle is Ryan, the CIO of the university. Reporting to Ryan are five directors. The next row of circles shows five managers. Notice that Jenny reports to both Ryan and Morgan; she is a director and a manager. Each manager has several reporting supervisors. The next row shows supervisors and each supervisor has a team. The supervisors are presented in circles to save room.
Nick and 2Nick are the same person. 2Nick is the place holder for Nick, who was a manager, then was promoted to director level for the duration of a large special project, and will return to manager level at the completion of the project. Sam was moved up from supervisor to the manager level to replace 2Nick. When the special project is complete, Nick will move back to the manager level as 2Nick, but not back into the position replaced by Sam. Nick and Mae
have an interesting dynamic; Mae currently reports to Nick. I do not believe there will be any way for Nick to take his original place back as a manager because Sam is too strong. I would be surprised if Nick was just added to the management team without reporting supervisors; so it makes sense that Mae could be pushed out by Nick upon his return to the manager level. From a tactical leadership perspective, such a move may be a blunder. Mae’s team seems to include several people who are not interested in collaborating with the rest of the department. Morgan is trying to change the culture in that team to break down some of the division. From all accounts, however, Nick is a transactional leader. It seems unlikely that Nick will help to pull Mae’s team out into the mix with the rest of the department.

Jenny is shown in the manager row, being pulled up to the director level by intent. She has high group association with the manager level compared to the director level. The manager level has a dotted line around it because I believe this is where much of the boundary spanning happens for the department. This will be discussed later in Chapter VII and in Chapter VIII.

Ryan is the CIO of the university. He reports to and is a cabinet member of the Executive Vice President (EVP). Ryan has over 150 people who work for him. His main areas are Web, desktop applications, the teaching/student portal, servers, software support, hardware support, and human resources software. His job is to represent his department and to support the university with all things related to information technology. I have seen Ryan on several occasions, all at the university, and he has always been impeccably dressed, more so than what I have seen of the President, which is only to say that he seems particularly formal. I met Ryan during a presentation I made to an executive committee that included his superior and about ten of his peers. Ryan was very friendly and seemed willing to participate from the start. I am thankful to Ryan because, like the United Way Fair Share, participation was not required as a
part of the job, but Ryan strongly *suggested* 100% participation. When I asked a couple team members why they completed the form, they replied that the supervisor or manager said it was a political thing and “we just need to do it.”

Ryan has been in his position for six years. Ryan’s office is spotless and L-shaped with a couch and chair setting, a large clean desk, and a large glass-top conference table with room for eight—I would guess 600 to 800 square feet and may be larger than the EVP’s office. When Ryan has cabinet meetings, he uses the conference table. I met with Ryan two times and both were at the conference table. He is extremely friendly and people seem to like him around campus. Ryan has five cabinet-level reports, yet only three are named in Figure 9 because they seem to be most influential. The other two do not seem to be involved in the discussions or were not mentioned in the interviews. The two who are not shown are directors of ‘stand alone’ teams, meaning they are housed in different buildings across campus.

Nick is on a temporary assignment as project director to convert all software databases to an enterprise-wide human resource system. Of special importance is that Nick has only a few years to retirement and that at the end of the temporary project, in about a year, he will go back down to the manager level where he was just over one year ago (See Figure 9 for a visual depiction of Nick’s two positions in the organization). Nick did not complete an online survey for himself, although 22 of his team members completed it on his behalf and he did complete the survey as the superior on behalf of three external leaders. There were no less than six contact attempts to get him to complete the survey; I understood he was very busy. When I asked people with whom Nick worked or managed, I received mixed reviews. One comment was that “he had his favorites.” Another was that “he was a fantastic manager.” And a third was that “he was a hard worker and as long as work was completed as expected, there would be no problem,” which
might describe any manager. His total description paints a picture of a transactional manager. If that is true, it seems to make sense that he was assigned as a project manager on a large-scale project. The typical project manager is thought of as a task master who is really good with detail and requires that everyone follow the project plan as signed off by the sponsor (whomever signed to have the project completed). Being a transactional leader may be appropriate early on in a project and on heavily task-based projects, but it may well be hurting his ability to influence followers as the project life cycle continues and people become comfortable in their roles within the project.

Morgan is the director of operations who has been in ITS for the past 30 years, though only nine at the university. Morgan was the interim CIO, without the title, for a year or so before Ryan was hired. Morgan was told by the EVP that he would not fill the position permanently because he did not have a college degree:

I came here as the director of operations and then my bosses retired and gave me their job. So, it comes up once in a while because the faculty get irritated that I don’t have a degree. There’s one in particular who’s no longer here who was really mad… You know… ‘How could he tell us what to do when he never went to college?’ Morgan said he did not care, although the amount of time he spent talking about it suggests otherwise.

Morgan takes great pride in developing his managers and being known as fair, honest, and caring to all the people who work under him. He has taken special care to develop a rapport with Sam and fully expects Sam (a manager who reports to Morgan) to be his replacement.
Morgan has a nice office in a locked area of the building. Morgan’s office is significantly less
nice than Ryan’s office—especially for only one level down the hierarchy. He has a large desk in
the back third of his office that faces the door and a seating area with couch, table, and two or
three chairs. Morgan’s office seems a bit more comfortable than Ryan’s just because it is not so
stark. When Morgan has a staff meeting, he uses the sitting area. When I met with Morgan, we
sat at the sitting area instead of around his desk. Morgan is also very friendly. He uses past
experiences and storytelling to get his points across. Morgan is a caring manager and believes in
giving a person mental space when required:

There’s a point in time where your body and your mind are stressed and you’re sitting at
your system and you can’t concentrate. It’s a beautiful campus, go get yourself a cup of
coffee, go take a walk... no one’s going to come down at you. What these people have to
understand is no one is after them; no one is going to hurt them. We talk about it all the
time. If somebody comes in and said somebody died or somebody’s kid is sick...
understand with passion what that means to them and that they can’t focus on their job all
the time. Tell them that if they need to have some space, give it to them. We talk about
this kind of thing all the time. It’s important.

Morgan believes that part of his job is coaching his staff and coaching his staff to coach
their staffs. “Someone will say ‘I’ve got this employee who I’ve got this problem with... what do
I do?’ I generally don’t speak then, because it’s more fun to listen and at the end I’ll say ‘Those
are all good things, you can do this, and this, and this.’”

Morgan made a comment about money: even though Ryan makes the decision, Morgan’s
name is on everything. When asked about training, Morgan said “I approve all training. I don’t
ask him” in a bit of a defiant way. Interestingly, I don’t think Ryan cares.
Jenny (yellow circle at left) is a direct report to Ryan as a director, but is also a direct report to Morgan, as a part of the management team, and appears to prefer her position in the management team. She is in charge of all of the support services (software, hardware, desktop, help desk, Web) at the university. Like Morgan, Jenny was a key player in nearly every discussion I had with superiors, team leaders, and team members. She has been at the university throughout her career and will have the option to retire in six months. She is also extremely welcoming and friendly. Jenny has a very strong relationship with at least Morgan, Sam, and Mitch, a supervisor who works for Jenny. Although Jenny reports directly to Ryan, she certainly identifies strongly with her connection to Morgan and his management team. A major reason is that Ryan appears to be a bit of a micromanager and, more importantly, not open to discussing areas where Ryan may be wrong or where others disagree with him. There are at least two sides to this that will be presented later.

The next level includes five managers (shown inside the brown rectangle) who report to Morgan. This is the key group around whom most of the influence and support for boundary spanning happens. Sam and Jenny are the key players of this group and both are very well liked throughout the department.

Each week the managers meet in Morgan’s office and close the door. The purpose of the management meeting is to help each other become more effective and efficient at their jobs through offering resources (time, money, and expertise), camaraderie, sense of belonging, and emotional support. In the management meeting, anything is open to discussion including things
that Morgan has done or said that they disagree with or just want to question. Morgan is very willing to listen to comments without making the managers fear repercussion. At this level, Alex, who is a communication specialist and not a report of Morgan, attends each meeting to be a part of the team.

Mae reports to Nick and has only been in her position for a year, yet also reports to Morgan. According to Morgan and Jenny, Mae has staff attitude issues and these are well known at each level. These issues are attributed to Mae’s team being ‘old time’ programmers. This was the one group from the ITS department that did not complete the survey. I did get one returned informed consent from this group and it was a decline from a member of Mae’s team. After a few reminders that I was looking for participants, Ryan’s administrative assistant called to tell me that Mae’s team would not complete the survey, and said she was not comfortable telling me why. This must be an eye-roller and an Achilles’ heel for the director-level cabinet because within three minutes of ending the phone call, Morgan called me and said that Mae’s team members were old programmers who are paranoid about completing anything online because somehow it would not be safe enough and private information would be compromised and likely misused and the information would be tracked and used against them. It seems strange that an entire team could be so defiant of Ryan; either they are extremely high performing in a niche area and do not need his direct support or they had reason to fear repercussions that may come from speaking out honestly. Maybe that team does not feel supported at all by management, so they just refused to participate—maybe it is not a staff attitude issue.

The next level includes supervisors; Mitch is the only supervisor in focus for this study. Mitch, Buzz, and the other supervisors (shown in Mitch’s circle in Figure 9) all report to Jenny. Mitch is the newest supervisor. This level seems to be filled with 20-somethings who are
responsible for between six and twenty team members. All of the people in these positions have been at the university for several years and have been promoted to their current positions.

The hierarchy is well established both because there is little upward movement or staff turnover and because people are comfortable in their safe positions; they are confident and competent. Part of the comfort certainly comes from the management-level support. While supervisors may wish to move up to the management level, they are happy reporting to Jenny and Sam, who are very easy to work for and with. A similar relationship exists between the managers and Morgan. That is due in part because they really appreciate Morgan, but also because a move up would require them to report to either Ryan, who is not nearly as comfortable to them as Morgan is, or to a new, unknown, CIO. Apparently the prior CIO was much harder to work with than Ryan is.
CHAPTER VII. INDIVIDUAL COMPOSITES

The focus of this chapter is the set of three external leaders who were selected using the scatterplot (Figure 8). Sam was the score on the bottom, Jenny was the score in the center, and Mitch was the score on the top. These three were selected because they had nearly the same EI alignment scores, but very different BS alignment scores. The order of interviews was Jenny, Mitch, and Sam. After completing all external leader, superior, and team member interviews and analyzing transcripts for themes, I decided to interview Jenny a second time because she appeared to be a network hub.

Individual Composite: Jenny

Jenny is a very friendly woman who is very effective in a business way, yet very concerned for the people she works with and for whom she works. She was professionally dressed compared to both Mitch and Sam; this may only have been on the particular days or because she has more exposure to people outside the department. She has what looked to me to be the most usable desk of the three leaders: an L with a lower side. Her desk was covered with what looked like project files. She has a small couch and a couple chairs on the side of her desk. During both interviews with her, she sat behind and to the side of her desk and I sat on a couch which made me quite a bit lower than she was. She was not, however, making me feel like the difference in height had anything whatsoever to do with projecting power. The more I spoke with her, the more I liked her. She probably received five phone calls or emails both times we talked.

Jenny’s boss, Morgan, seems to be very honest and caring, yet no nonsense; he knows who he is as a person, how he wants to relate to his staff, and how he wants his staff to relate as a
team. If Jenny needed any type of persuasion help, she would get it from Morgan and the rest of her peers on the management team.

Among the boundary spanning competencies, *relating* is the perfect description and main mode of influence for Jenny. During the first interview, most of the discussion went toward trust and listening as the anchor she returned to over and over. Through the transcript coding process, I discovered that relating was used for nearly 75% of our discussions.

According to Morgan, “She builds rapport with people through trust. They know that when she says something, it’s honest. They know that if she tells them something, it’s the best that she can tell them.” and “Jenny shows a lot of care and has gotten respect from her people. Her personality, her ability to talk with people, her ability to listen.” Perhaps Jenny is likeable because she is so humble. According to Morgan, “Sometimes she says ‘I can’t believe I make the money I do. I can’t believe I’m doing this.’”

When Jenny was asked how she builds a relationship with her team, her response summed her up as well as anything could:

Making sure they’re okay. Making sure their well being, their work environment, that projects are going the way they want to see them go. I communicate about deadlines and how difficult it is sometimes to achieve those. And—but I understand and we’re in this together. It’s about working together as a team. It’s not about me being a boss and them being employees, it’s about being part of the group to get this work done.

To build relationships with superiors, Jenny said “I prove that they can trust me with confidential information and personal information.” This statement was consistent in that she did not mention technical expertise unless I specifically asked about it. I asked what she looks for in a new hire and her response was
In my opinion…the way I hire people is more about their personality and... it’s not about their technical skills. I can get them technical training, but I can’t teach somebody to be a positive, good employee with a good outlook, willingness to work and a willingness to learn. So I look for those qualities and then train them on the technical. I mean, I can make anybody a technical, but I can’t make somebody be friendly and customer service-oriented and compassionate. I look for those qualities.

Individual Composite: Sam

Sam’s office is within a locked area of offices near Morgan’s office. Walking through the door, an electric guitar sat on a stand next to a couch and table. The next thing I noticed was a pair of sand-colored army boots hung by their laces on a wall and a large piece of plotter paper containing the campus map behind the desk on the back wall. There is a window that runs the long distance of the room. Sam’s desk sits at about the middle of the room facing the door. The room struck me as a military person’s utilitarian office; sparse, not very homey, and beige-colored. It turned out that the boots were a gift from a military person and Sam hung them for fun. He is in a local band, and seems to fit in socially with most of his team.

Sam sat behind his desk and I sat in a chair in front of his desk. Sam talked with a formal, friendly tone that did get less business-like and more friendly with time. Sam is very clean cut.

I heard very good comments about Sam from all but one person who offered neutral comments. He has a team that is demographically split into a young group and an old group. Sam clearly has a good rapport with the young group and once shared an apartment with one of his direct reporting supervisors several years ago.
In my opinion, Sam has the opportunity to collect more corporate information than anyone else under Ryan. Sam works with Ryan often for coaching on department finance and with Morgan. He consults with Jenny regularly. While my instinct is to say that Jenny has best access to organizational information as a hub, I believe that both Ryan and Morgan are feeding Sam information to help him understand about all the nuances required of a CIO or director of operations.

Sam seems to have a positive attitude that helps him navigate challenges. When asked what the best and worst things about his job are, he said 

the downsides are what creates the good upsides…. The new challenges are fun to try to develop a new solution where we can say ‘Okay, last semester we had this problem with the portal with so many people trying to log in. Here’s what we need to do before this coming fall so we’re ready for it.’ So, those kinds of challenges are fun, it’s just the time they are getting created is tough.

Sam has both people and technical skills. Sam does a lot of research to build his technical expertise. According to Morgan, Sam is mostly self-taught. Sam is trying to build personal strengths in strategic areas so that if there is an opportunity to take Morgan’s job, he will have the knowledge needed in many areas. While technical skills might have gotten him into his current position, his people skills are what will keep him in the space.

Physical distance to all of his reports is low as they are all in the same area. Social distance is low for many, which seems to suit the majority of his team because they are self-sufficient; however, like Mitch (presented later), Sam may do better by having higher power differential with a few of this lower performing team members. One of Sam’s team members said that Sam is frustrated that he cannot figure out a way to motivate a couple of his older team
members. Jenny also mentioned these team members who seem not to care about performance. It seems that these particular older team members, for the sake of the team, need to be brought up to baseline or removed. Communication happens quite often for all but the two low performers who seem less responsive and welcoming to Sam.

Sam builds relationships through small, personal things like awarding stickers (like one would have received on a paper in elementary school for a job well done), stopping by to personally say “thanks,” or texting a message of thanks. While I was interviewing one of Sam’s team members, I overheard Sam walk into an office a couple doors away to say “thank you” to someone for helping out on a task. This behavior supported his claim that he is a leader who makes a point to personally acknowledge and appreciate his team members.

In thinking about how Morgan talked a great deal about the ways in which he relates with and continually coaches Sam, I asked Sam if he tries to deal with his reports in a similar way that Morgan deals with him. Does he try to coach and be a mentor to them, or does he not have that same kind of relationship?

There is some value to having some people who work for you as friends. There are some challenges too. You don’t want to let them just run around and do whatever they want; you still have to have the respect and control of them at some level. At some point, you are going make a decision that is going to make them mad. Even if they’re your friends, you still have to be able to do that for the department. Those things make it a little more difficult, but most of these guys up here are good about understanding when I came up here I said ‘We’re going to try to always be on the same page and there’s going to be times when we disagree, and we’re going to have to do it my way just because of other factors or factors that I may not be allowed to tell you of why we’re going in this
direction.’ I think they all understand that as long as they feel they have input and can say ‘Okay, here’s why I disagree with what we’re doing, but I’ll go forward with it because you’re telling me to.’ As long as you can keep that structure in place, it works really well.

It seems that Sam is really working to maintain a good working relationship with his team as a whole. He tries to stay positive and friendly, but is concerned about keeping order. I was reminded that early in his interview, Morgan mentioned how hard it is to maintain a relationship in general—“like a marriage, it’s hard work,” but when Morgan was asked how Sam builds a relationship with him, Morgan said

I don’t have to build a relationship with any of my people—even the lowest of the low. They may hate me as the director, but personally, they like me and they know I’m not doing anything to hurt them. Some of them have a grudge because I moved some of them around, but it was in the best interest of department. I don’t work on the relationship, I don’t have to. I work at him growing.

It seems as if Sam’s care for his staff may be somewhat selective toward those whose attitude and performance warrant the care. There is a person or two whom he does not know how to motivate and sounds like he has given up on that relationship. He seems to have decided that the people are going to retire soon, and then he will be able to make changes needed.

In a question about communicating organizational politics and the effect on Sam’s team, Morgan’s initial answer was “We don’t have any politics.” I clarified with “Aside from this group?” And part of Morgan’s answer was “My suspicion is that he [Sam] is very tight-lipped about things that he can’t talk about. And he puts positive spin on what he has to get done”.

Before taking the job as a manager, Ryan and Morgan “preloaded” Sam about projects, people, and personalities—no doubt these conversations included how to deal with the two who
do not seem to fit in. It may have been a nice exercise for Ryan and Morgan to have told Sam that the two were actually very good workers and let Sam go in with a positive attitude and see what expectation did for attitude.

Sam’s relationship with Morgan is interesting. While it appears that Morgan is coaching, empowering, and relating with Sam, it also seems that Morgan is persuading Sam to work the same way he does. And even if Morgan says that he wants Sam to do it on his own, Sam is happy to be the same person Morgan wants him to be.

Sam has a great relationship with Morgan and Ryan and is very appreciative of their time and expertise. If I had not spoken with Morgan, I would not get the idea that Morgan and Sam are that close. Sam spoke mostly about his team members unless specifically asked about his superiors. Morgan spends time helping Sam because, according to Morgan “I can’t invest in Jenny to be a leader because she’s going to retire. Sam, he’s going to be there and I’m going to make sure that he has every bit of my wisdom.” This sounds like political influence more than empowerment for Sam to grow into his own person. Morgan is trying to get Sam to get a master’s degree so that Sam can step into Morgan’s position someday. Morgan tries to help Sam stand confidently on his own without second guessing his own opinion. According to Morgan,

Any time Sam had a discussion of an item, he was staring at Nick straight in the face and as they discussed it, I watched it and I knew what he was doing. I let it go for a couple weeks and then Nick would answer back and they would have a conversation as if we weren’t there—like a Groucho Marks aside, speaking lines. So I called him in and said ‘You’re great, you’re smart, you got all the stuff, you need to stop referring to Nick. You work for me, I’m pleased. You don’t need to please him. I want you to manage that area with your skills and talents, not his. He’s not watching you anymore, and if he is, we’ll
stop that. Don’t defer to him any more, I want you to talk to the whole audience. You need to understand, you can handle what you got. He’s not there anymore, he can’t see what you’re doing, so don’t try to please him.’ He said ‘Thanks.’ He came back in about a half hour and said ‘I really appreciate that because I know that’s what was happening’…then he sent me a text message and thanked me—because he was doing it. I want him to do it on his own.

According to Morgan, Sam does not do too much delegating because he wants to keep his hands in the content. “But as soon as he becomes me, he will not have time for it and will have to.”

There was an interesting piece of coaching going on—setting Sam up for reduced self-efficacy because he knows vendors don’t want to deal with him. People in sales are trained to find and deal with the decision maker and not to waste time with people who can’t affect the outcome of a sale. Time is money and time spent with non-decision makers is costly. One unintended consequence of this coaching is that, if Sam does build a good rapport with the sales person over time, it is likely that he also may pay more than the lowest price because his friendship will get in the way of pressing for the best price. I asked a question thinking that I would hear about how the staff makes good justification for resources but was surprised by Sam’s response.

    Frank: If I ask what makes it difficult to get external resources, would your answer be justification from your staff?

    Sam: Yeah, it’s justification. The other thing that’s difficult is a lot of vendors will not work with me on pricing decisions. They want to talk directly with Morgan or Ryan before they start doing any negotiations on what a ballpark figure of that a solution would
cost? So, that’s nothing I can control, it’s the vendor saying he’s just a manager, ‘he’s not going to be the one making the decision, so I want to talk with the person who has the ability to say yes or no.’ Morgan and Ryan don’t want to do all that work, so I try to get at least a reasonable price before moving to Morgan or Ryan.

It is, however, fun to be in the gatekeeper’s spot and Sam will eventually have a good contact database of sales people who will also grow in their company ranks and will likely be able to develop a good relationship with Sam based on time and loyalty.

Individual Composite: Mitch

Mitch is in his 20s, has a clean-cut appearance, has a little more conservative personality than Sam has, and is very friendly. He supervises fifteen people and twelve of those are technical support specialists (TSS). The TSSs go to the office of any computer user on campus to troubleshoot, add or remove software or hardware, and exchange computers. Mitch was a TSS for several years before he was promoted to supervisor. Recall that Sam had the position of Mitch prior to his promotion a little over a year ago. The TSS group is a part of a system of support which is supervised by another supervisor who reports to Jenny. Generally, a client calls in to the help desk with a problem, and the help desk technician attempts a quick diagnosis and remote fix via the client. If that does not work, the help desk technician issues a work order to the TSS team. The work orders are ranked by priority and assigned by one of three lead TSSs to one of their team members. Each TSS is assigned to a building and he or she is responsible to maintain all systems in the building. This gives a familiar face to the users and a history to the TSS for each machine. Mitch was a part-time TSS throughout his undergraduate and graduate school years.
For part of that time, he was in charge of the executive building (office of the president, vice presidents, provost, etc) and has kept that building to himself as the TSS even after his promotion to his current supervisory position. A couple reasons stated were that he wanted to stay current with technology and that he liked being in the know politically. It would be a boost to anyone’s ego to be recognized across campus by any of the executive staff.

While wearing his supervisor’s hat, Mitch seems to have little contact with superiors above Sam and Jenny. This was obvious when he smiled and looked nervous when talking about his interactions with Ryan and Morgan. Perhaps lines are not as open as the upper levels think they are; however, as Ryan mentioned, they cannot practically spend a lot of time with each supervisor. I believe this nervous behavior is due to the leadership distance (discussed in greater detail in Chapter VIII). Both Morgan and Ryan are on a different floor; they are both significantly higher in the organizational hierarchy, and much older than Mitch is. As a result, Mitch does not feel that he has contact very often. Exposure is obviously low because he only mentioned his small-talk about the Chicago Cubs baseball team with Morgan. When I talked to Morgan, he also mentioned only small-talk about the Cubs as a common interest with Mitch. Although Morgan said that Mitch is very bright and a great technician, Mitch does not seem likely to increase exposure to that level unless he is moved up to a manager level. Two of his team members said that Ryan stops at Jenny’s office every day. Ryan would have to walk past Mitch to get to Jenny’s office. Ryan clearly passes right by unless “he has a problem with his Palm,” because according to Mitch, that’s one of the few times he talks to Ryan. I believe that if Mitch made an effort, he could get to know Ryan quite easily—he just needs to find something they personally have in common. While they will likely not ever be good friends, he may at least build a rapport with Ryan. It sounds like Jenny has about as good, or social, of a relationship
with Ryan as anyone in the department and she said that he does not share anything about his personal life with her.

Mitch’s office is in a suite of offices, certainly not showing a lot of status. The room is about 10 x 15 with his desk facing the door and a window behind his desk. Three chairs line the inside wall of the door and there is a round table with four chairs in front of the desk. The office seemed very stark to me. I did not notice many books around or things on the wall.

Mitch sat at the table with me and talked with a very friendly tone. Mitch has been in the supervisor role for about a year and was promoted from within the TSS team that he now supervises. One of the things he likes best is the freedom and power to make hardware decisions; Jenny noticed this, as well. One of the first tactical moves Mitch made when he took his supervisor position was to create TSS teams, which he was not allowed to do as a TSS when Sam was the supervisor. It seems strange that Sam would not take Mitch’s idea to create TSS teams because, from all accounts, Sam used Mitch as a TSS leader in the same way that Mitch uses the TSS team leaders. Creating teams allowed more interaction, sharing, and rapport building between members and created point people (team leaders) who directly reported up to Mitch; this created further social distance from those people who were not selected to be the team leader and made the work of the low producers the problem of the team leader and not Mitch.

Persuading is the boundary spanning term that jumped out from my interview with Mitch as an issue. Persuading is about influence—leading. I left the interview with the feeling that, while Mitch is very friendly, and likely very technically competent, he was having trouble making the shift from peer to supervisor. He had a lot of issues in his first year that he had to work out: how to keep control over the team, what not to say in front of the team members, how
to reward good work, and how to get around some who otherwise would duck work. He talked about several issues that seem like ground-rule items where expectation has not been explicitly stated by Mitch, understood or acknowledged by the team members, or backed up with consequences for not meeting responsibilities. Initially, to let him get comfortable with me and the tape recorder in front of his face, I asked about the best and worst things about his job, he said he liked making hardware decisions for the campus clients, but surprisingly, he said the worst part would be the interaction with other TSSs sometimes. How their outside stuff that they deal with—they bring that to work and how do you deal with it—issues and things. They’re sick a lot or they have trouble at home. How do you deal with that stuff?

It was interesting to talk about this with Mitch. Later in the same line of questions, it was as if he stopped, looked back on his supervisory journey, and identified his milestones.

‘You come to me first before you go to somebody else’—another TSS. I’m a little bit more forgiving if you come to me and say ‘I’m having problems waking up in the morning’ rather than not coming in and just not telling me. I’ve gotten a decent response from people. I’ve had to push them. I’ve probably been too patient with some of them. I wasn’t hard-nosed at first. I noticed when you take a stance they tend to respond a little bit better.

Mitch knows how he would like to work and relate to his team, but cannot put his finger on how to get all of his reports to be more conscientious. I believe he is serious enough that he will do something to either influence the slower employees to work or find a way to remove them. Mitch seems to have a friendly relationship with most of his team members. He has two direct reports in an office just outside of his own and he visits with them often. They do seem to
be friends during and beyond work. Mitch talked about having good listening and trust building skills. While I believe that he has a very easy time building a personal rapport with people, the listening and trust building came out so fast that it struck me as something that might have been said to him during a recent coaching session for him. There appears to be a couple of his team members who are not performing at the expected and preferred level; however, I did not hear that there was a great effort being put forth to change or develop those people. There was little discussion about them and he may be trying to focus on the good staff thinking that they would somehow cover or build the slower staff. I did hear consensus and acknowledgment that some of Mitch’s team members are very good technically, but would not be appropriate for management. I also heard that Mitch is quite good at knowing whom to trust with new information, which was a comforting feeling to the team—two team members described this knowing whom to trust, and I believe the team members and Mitch to be friends, so I suspect that they had at least a discussion of reliable sources recently. Mitch has close proximity to two of his reports and the lead TSSs feel free to “just pop in.” Mitch has low social distance with high performers, but too low of social or power differential with low performers in his area; he cannot find a way to get them to work as hard as the others do. Jenny mentioned that the low performers in his area feel entitled not to have to work. Mitch communicates often with the high performers, but does not communicate as often with lower performers.

Mitch shares information among his team members differently, as would be expected. Again, the high performers get more of his time and conversation. He meets with Jenny several times per day informally to build his own confidence and competence. He has built a very strong rapport with her, as all of her reports seem to have done.
Mitch is in the coaching mode from Jenny, but not to his staff. While working as a TSS, he was the de facto leader when the supervisor was unavailable. But he did not have authority. He was a nice person with good technical skills and was willing to help. Empowering does not seem to be a descriptor that is important to Mitch’s team. I got the sense from speaking with Mitch and his reports that he is very trustworthy with work and personal information. It appears that his team respects that there are some things that he is not allowed to talk about. These people do not seem to need his coaching to do their jobs. It seems that they consider him to be a peer more than a manager, which is not a problem because they do communicate with each other and really do seem to have a cooperative team spirit and camaraderie. Mitch empowers the team to the extent that he knows each person’s strengths and weaknesses and allows each to manage his or her time and offer accepted input.

When looking back at the boundary spanning alignment score differences (the reason these three external leaders were selected for case studies), the qualitative data tell a much different story. The alignment scores must be put into context of the external leader and team relationships. The boundary spanning alignment score on the scatterplot shows that Mitch thinks he is a much more effective boundary spanner than his team thinks he is. Conversely, the boundary spanning alignment score shows that Sam thinks he is much less effective at boundary spanning than his team thinks he is. While the scores appear to show a difference in the leader’s ability, it leaves out the relationship between the leader and the team, and also the team’s reliance on the leader.
Leadership Distance

While the official hierarchical structure of a department is shown to people looking in, the informal social structure is more important to getting things done—especially in this department. As stated in Chapter II, leadership is not just a person trying to influence others to act. There is an aspect of acceptance of a follower wanting or needing to be led. Leadership is less welcome when the need is low, when the work is highly task-driven, or when the leader has little to offer (Padsakoff et al., 1995). Therefore, the leader has to be able to identify need. To be better able to identify need, the distance of the leader from his or her team should be considered and set to appropriate levels. Leader distance, according to Antonakis and Atwater (2002), is affected by a social or power differential, physical distance, and occurrence intervals. Social or power differential is manifested when one believes and acts as if he or she holds a higher social or power position than others do. An example would be of a superior who does not acknowledge a team member when he sees the other in a social context, such as on an elevator. This person could display his social status by making the team member believe that the superior believes he is too busy or important to talk with the team member. A display of the power differential might play out as a threat that some privilege might be taken from the team member unless he or she is willing to toe the line defined and set by the superior.

Physical distance literally refers to how near the leader is physically to the team member. Low physical distance, in the case of this study, is the twelve-step distance between offices of Mitch and Jenny and of Sam and Morgan. Physical distance could also refer to the figurative description of a team member’s access to a leader. For example, a leader could be a twenty-second walk away—down the hall, or accessible within twenty seconds via conference call or
instant messaging. Depending on the need or intensity of interaction required by the team member or leader, the virtual twenty seconds may be equal in quality to a face-to-face meeting. A team member could feel that if the physical distance is low he or she has quick and easy access to the leader, as in a virtual leader who might utilize a technology such as instant messaging with a video conference feature. Physical distance requires negotiation and open communication between the leader and team member so both understand how, for example, the other values face-to-face contact compared to virtual.

Occurrence interval refers to how often the leader checks in with the team member. There could be set weekly meetings or the team member or leader may be able to just pop in to the other’s office for a brief catch-up. The type and interval of occurrence depends on the need of negotiation between the leader and team member. For example, during a project lifecycle, team member’s need for an external leader fluctuates. Early on, a team member might have high need to interact with the leader to understand the goals, strategies, and resources of a project, but once these are understood and planned, the need would significantly reduce. Again, late in a project cycle, during quality assurance testing, need may be greater for more intense meetings more often for a short while. After that critical time has passed, the need for the intensity and occurrence would reduce.

As with shades of gray, the context of any distance is not one or another, it is a configuration or mixing of the three to some degree. For example, Ryan appears to be very socially distant from his reports, while Morgan and Jenny make it a point to reduce the social distance between themselves and their reports. This distance can be contrasted easily through examples of Ryan not allowing dissent. As Morgan described, “I give him the truth sometimes when he doesn’t want to hear it. I’ve felt the wrath of his violent reaction.” Similarly, Jenny
described a time when “the boss didn’t want to hear that, so we got into a pretty good exchange of words and finally, then, he backed off and said ‘Well, he’s your employee and you manage him the way you think.’” I asked whether Jenny ever had to stand up for herself against her boss and whether she takes a stand when someone makes a decision that is not in the best interest of the university. “I can think of less than five times that I have called him on it. It’s uncomfortable and sometimes tears later on, you know, but he ends up coming around and wants to listen to what I have to say.”

In contrast to Ryan, Morgan and Jenny are very open to dissent. Morgan reduces distance, but with a clear line beyond which his reports are aware that he has the last word. He is the cooler of the group (the leader who directs the bouncers in a bar). He tells everyone to be nice. Be nice to employees; be nice to your peers; be nice to your clients. But when someone steps out of line, he steps in to remove that person. Jenny tries to remove any power distance by putting emphasis on the projects that take priority. Very early in the first interview with Jenny, when asked about building trust with her teams, she said “Listen to them, communicate to them and allow them to communicate to me. Respect. I learn to build trust and in turn they learn to build trust with me.” During the second interview, she made a very similar statement, but with the same meaning.

Leader physical distance is very low between Morgan and Sam, between Jenny and Mitch, and between Mitch and three of his direct reports. While distance could be a coincidence, it is interesting that each leader mentioned the people in the near offices stopping by for a quick chat, to ask advice, or just brainstorm over problems. It would be natural that people in nearer offices become closer, therefore reducing the power differential and social distance while increasing the occurrence of the interactions. Among managers, Mitch, Sam, and Jenny are in
their offices regularly. An interesting difference is between Morgan and Sam because Morgan is often out of the office or meeting with Ryan and not available for Sam, certainly not available as often as Sam would like. Morgan said that he is available any time for Sam; however, both Sam and Jenny said that Morgan is often away from his office or meeting with Ryan and is not really available that often. I was also told that it is difficult to get onto the schedule of Morgan because he is tied up in meetings much of the time. So, Sam is still getting coaching from Jenny quite often, perhaps more than Sam is getting from Morgan—much to the chagrin of Morgan.

Regarding physical distance and occurrence, Jenny said that she communicates via email quite often with two of her reporting supervisors. Both are in the same building and certainly within a thirty-second walk of her office if they were inclined to stop in. While I believe she would prefer personal contact with each, she did say that they like to communicate electronically. Practically, as programmers and tech support people, the computer is the first line of communication for them. They may find electronic communication more comfortable and perhaps as equally satisfying as face-to-face communication.

Need

While any configuration of leader distance can be identified throughout the hierarchy from Ryan to Mitch, leader distance also requires a context that includes need, quality of interaction, timing, and direction of the need. Need refers to the fact that one party does not have, or does not believe he or she has, all the resources (e.g., time, money, expertise) needed to do his or her job well. Need comes and goes throughout a project, so that the need may have critical time windows, outside of which a team member may not even consider a leader useful. Therefore, if a team member needs help at a particular juncture of a project and the leader is not available, able, or willing to offer resources, he or she may as well stay away and the value of the
leader is diminished. Need moderates the value of the leader help (deVries et al., 2002). Mitch and Sam seem to be leading teams that are very self-sufficient. Both have team members who are extremely competent and confident; therefore, the team members need leadership less than other teams’ members might. It appears that both Mitch and Sam are thought of as peers by their team members as much or more than they are thought of as leaders or managers. Mitch may have that relationship because he was a member of his team prior to being promoted to supervisor of it. There has been no turnover since he became the supervisor, so the view of him has likely changed little in the past year. He also carpools with at least one of his reports, which may concern some other team members regarding trust, fairness, and communication. Additionally, there is a need for Mitch to become more involved with the lower performers, if not for personal reasons, then for the good of the rest of the team and the university. The need may not come from the lower performer, but could come from that person’s position—as a team member within a system.

As portrayed in Figure 10, a team member’s need for a leader ebbs and flows throughout a project. And the ebb and flow vary for each team member. A leader can help by bringing resources to the team member at specific times during a project. These times are dictated by the team member and the process. Active leader help would have the leader know when and how to interact with the team member to give the appropriate resources only when they are needed, and then go away and allow the team to do its job. Low social distance may be important here so that the team member feels comfortable that the request for help will be heard and acted upon with priority. The occurrence interval would be critical here because the leader would need to be effective likely for a short time only. The leader needs to give quick access so the team member can stay on task and on time. When the need goes down, the leader would not have to have the
same occurrence interval, so he or she can move to the next place of leader need. For example, Morgan described noticing that one of his reporting managers was having trouble getting work done [she recently had a death in her family]. So, he suggested that she walk around campus to take a break and clear her head. Jenny described a time when Mitch was nervous about calling a dean to give what would likely be taken as bad news. Jenny had Mitch do it in her office so they could make a conference call and Mitch would feel more comfortable and confident that if he did not know how to handle the situation, that Jenny could help. A negative example was described by two of Mitch’s team members that when there is interpersonal trouble among the TSSs, he does not get involved to help them work problems out. Instead he waits until one of the TSSs goes to Mitch’s office, closes the door and yells at Mitch for the way things operate. Perhaps Mitch takes that time to coach the TSS on how to handle his situation, but it seems that one should not have to yell to get a problem addressed.

Figure 10. Need moderates effects of boundary spanning.

Note: the distance between the yellow dotted lines show critical times of need.

A simple example of how need works in Figure 10 can be seen through electricity. The need is for light. The highest need is for very bright light and the low end of the curve is very low or no need for light. At different times, we need more light than others. For example, while
building something and a small part drops and rolls under the couch or refrigerator—need is for intense light to find it because the 60 watt bulb on the ceiling does not do enough. When reading at night and the light is not bright enough, one may fall asleep or could strain his or her eyes (an unintended consequence). The constant light may be fine generally as a light on in the room to help see, but is not necessary often and when nobody is home or in a room, it does not help and it is a waste of money (which is unwelcome). Constant light does not cover the spectrum of need and can be frustrating when it is not enough at a time of high need and a negative when unneeded. The beauty of electricity is that it is always waiting to be used—just flip the switch to get the full power. One could add lights or brighter bulbs for those times when intensity is required, but it is up to the user and supplier to keep the correct inventory.

Sam and Mitch continually look out for new technologies that might help the team members. According to one of Mitch’s team members, Mitch does a good job of keeping up with technology and often drops off useful articles and product advertisements. Morgan said that Sam is self-taught and often reads product manuals to ensure that he is up to speed with his teams. One of Sam’s team members also said that he does a good job of forwarding interesting articles. Mitch and Sam’s interest in keeping up with technology may help each one personally, but it also helps each one to build competency and capacity to help the teams when needed.

Constant leader help would have the leader offering the same resources throughout the project life cycle. Constant leader contact shown in the horizontal parallel lines in Figure 10, could be high or low. Constant leader help might have occurrence intervals of weekly meetings and not be very accessible any other time. This creates pressure for the team member, in fact all team members, to be extremely well organized, and compartmentalized to make sure that the need will be recognized or fulfilled by the leader. Lack of help when it is really needed would
reduce the effectiveness of the leader to support the team because the team member would stop calling on the leader for help—knowing it would never arrive in time. An unintended consequence of the lack of active leader help may be quality assurance shortcuts, missed steps, or non-published process changes. Since leader help is less welcome when not needed, the constant help leader mode also has the negative consequence of misplaced help: a leader bringing resources to the wrong team member at the wrong time and wasting time and other resources that could be directed to someone else who is in need. During times of low need in a project, a leader would be in the way of one team member at the expense of another team member. The gray shaded area in Figure 10 shows the area where the leader would have little effect on the success of the project team. Jenny, for example, describes Ryan as a bit of a micromanager and very specific about the way he wants things to be done. Micromanaging is unwelcome when the team member is perfectly capable of handling the job would need for help. Micromanaging is not help.

Effective boundary spanning requires emotional and technical intelligence to identify and act on need, both human and process. For example, the leader relies on emotional intelligence to pick up on social cues, such as a voice tone or speed changes, that accompany need for help. The leader also relies on technical intelligence to understand that at a certain time in the development process, the team members generally need help, or if milestones are not met by a certain time, relative to the project timeline, something needs to be done to get the project back on track. Mitch certainly has the technical intelligence to know what the TSSs need and how they relate to clients. One of his team members described relying on the word of other TSSs about client status and, while he may not have seen the specific client, he knows what is plausible or likely and how
to help the TSS deal with the client problem. Mitch’s working in the same position as a TSS helps him understand the technical relationship and the client relationship.

Quality of interaction is important. Ryan has coffee with Jenny every day, but never talks about his personal life, only asks about Jenny and her personal life or talks about current news stories. This makes Jenny wonder why he is not willing to share personal information. Ryan also plays poker occasionally with some of the team members of Sam, Jenny, and Mitch. According to one person, when Ryan joins, the communication is different; “the nights they play cards with him are different than when he is not with them.” Everyone I spoke with was well aware of the managers’ meeting where everyone can say what they want and feels safe that it will stay in the room. This is one big source of coaching and networking within the same hierarchy; they all share and try to help solve each other’s problems.

Timing of interaction refers to the leader’s ability to read cues and know when a team member does need a resource, what type, and how it should be delivered. One team member said that

[the EVP] has been known to just show up and that’s kind of nice. She rarely comes over here just to break someone’s kneecap, but particularly during breaks when most of the campus is on holiday, we are here because that’s the time we do a lot of our upgrade. And it seems like the times when a stressful project or there is something going on, she will appear out of nowhere and go ‘Hey, how’s it going? Do you need anything?’ She’s pretty supportive that way.
The same team member also said of Sam,

I can’t say how many times I’ve come in during the middle of the night to do an upgrade
and he’ll show up and say ‘I brought you a coffee, how are you doing?’ He’s willing to
jump in to help where he can.

Popping in when a team member is extremely busy and feeling stressed about a project is a good
time to bring resources to support the effort, but would not be an appropriate time for idle chat.

An argument could be made that the two of Sam’s team members who are the lowest
performers have the greatest need for leadership, but Sam is avoiding. Perhaps he lacks the tools.
Perhaps he wants to spend his time focusing on the high performers. Need may not be known by
the team members, but Sam needs to find what these lower performers need, get it for them, or
remove them if the need cannot be fulfilled and the performance cannot be increased.

Direction of need refers to the fact that need is definitely about relationships—give and
take from both sides. In Figure 11, Image A shows a typical organization map and B shows how
the map might look when considering leader distance and need. The arrows show reliance and
need for resources from above. In Image B on the right, arrows are going from Ryan to his
reports because he needs them as his support resources. “His expectation is that everything
should be perfect. He’s very anal about anything that he does and he expects the same. When he
came in, he really raised the bar. Looking back, it needed to be. Morgan was sometimes a little
too loose.” In this case, particularly because he is a bit of a micromanager and wants to have
details about many of the projects in development at any given time. Notice how the space
between circles changes in B to show the need and distance relationships.
Social Structure

Just as the Mercator Projection map is helpful for understanding relative distance in a convenient package, organization charts help to show relative position of the people within the organization. The social hierarchy may look like a mishmash of shapes and lines; some people and relationships look too crowded and some too lonely. In the case of this IT organization, Ryan would be further removed from the directors because of the power differential he maintains.

Figure 12 shows the official structure of the IT department (Image A) and what appears to be the social structure (Image B). The relationships reshape the structure, based on leader distance and need (Image B). Image B shows Mitch very near to Jenny because his distance is short, but his need is high. Mitch’s reporting team is not very near to him because his team members do not have as much need for his resources—they are largely self-sufficient. Likewise, a short distance is shown between Morgan and Sam because Morgan is often coaching Sam and a much larger distance exists between Sam and his team because they are not in as much need as
Sam for resources. Figure 12B also shows that Morgan is near to Ryan and the arrow shows Morgan as the resource for Ryan. This makes sense because Ryan spends much of his time with Morgan and Ryan relies on (needs) Morgan to help run the operation. The arrow also goes from Ryan to Jenny as a resource and direct report. This is a longer distance than Ryan to Morgan, partially due to the fact that Morgan does not run projects in the same manner that Jenny has to.

*Figure 12.* Hierarchy versus leadership map including distance and need within the hierarchy.

The blue dotted line, in Figure 12B, that separates the director level from the management level goes over Jenny to signify that she is inside the director level. The same line shows Sam over the director line to signify his pull toward Morgan.

While Ryan did say that the department was not a democracy, he did not say that it was consensus; but that seemed to be what he espoused by saying that “anyone could say what they wanted, but once it was decided, should be followed as if they were in agreement to present a united front.” I don’t believe he understood that this social governance structure also was not participatory. Ryan seems to think that he is allowing everyone to have free input just as the
other managers described, but that was not supported by Morgan and Jenny. An anecdotal story from Jenny was of a recent meeting where there was disagreement.

I didn’t say anything. He was mandating what he wanted me to do and I was taking notes and we were in the cabinet meeting, and one of the other directors said ‘smile’ because they could see my face. Ryan was sitting next to me, so he couldn’t see my face, but the other guy was sitting across the table. But as soon as he said that, I said ‘Well, this is something I don’t agree that we should be doing.’ And then that caused a big argument in front of the whole group, so that was uncomfortable.

A short discussion of situational appreciation is appropriate here. There does seem to be a divergence of understanding of the genesis of projects. I heard several times down the hierarchy that it is important to support what the management says. There is freedom to disagree while in the peer meeting, but once the decision is made, each person must toe the line and not bad-mouth decisions to their reports. Ryan did say that he has the same issues with his manager and peers in that he can argue his point about a particular project, but once the decision is made above him, ‘that’s it’ and he does not bad-mouth the decision to his staff and as far as they are concerned, he could have made the decision. He believes that would decrease his standing with his peers and manager and, at the same time, reduce morale of his reports. This is a problem of disconnect because there is a need at the director level for Ryan to reduce his social distance and create a shared ground. Ryan believes he is trying to buffer his reports from the whole organization and his reports do not see that he has an opinion, agreement, or even understanding of their position—even if he does not agree with the decision. Jenny did say that one never talks about personal things; they have coffee every day and
that’s a time of personal... we talk about my kids, or something he saw on TV. He’s not one to share anything about his personal life… about his wife or his weekend. He’s always asking ‘how was your weekend, how are the kids’… But, as far as him sharing anything personal…[shakes head no].

For some reason, Ryan does not share personal information; he might not want to show any weakness. For the cabinet, however, showing weakness is about support and building trust and rapport. At least Morgan and Jenny are used to a deep level of discussion from the management meetings, yet what Ryan thinks is deep is not the same as it is for Morgan and Jenny.

Sam worked for Jenny in Mitch’s position for four years prior to being promoted to a manager. Sam and Jenny do talk a lot and she supports him whenever possible. It seems very likely that Sam still relies on Jenny as a coach as much or more than he relies on Morgan. When I asked Jenny about how Sam is being developed as a manager, she said “I really like Sam and really want to see him succeed. He’s told me many times what a good mentor I have been to him. He’s picked up many things whiles he worked for me that has helped him to be more comfortable to make decisions…. The thing about Sam… the role he’s in now, he’s always asking ‘what do you think about this or would you read this….’”

Facilitators and Restrictors of Boundary Spanning

Research questions 5, 6, and 7 addressed the individual and organizational characteristics that facilitate and/or restrict boundary spanning of external leaders and how the environment could be better prescribed to facilitate boundary spanning.

Listening was easily the most common facilitator mentioned by team members, superiors, and leaders as a requirement for leadership. “Be receptive when a team member wants to talk.”
This was evident when a team leader says the leader is a good listener or tells an anecdotal example such as this from a team leader who reports to Mitch:

He’s got a job supervising people who go all over campus to places he never communicates with or talks with. So one of the things he does very well is listen to his employees—what they tell him about areas on campus. He probably hasn’t been inside most buildings in two years. But he’s going to listen to the TSS about what goes on in there. He’s able to analyze that effectively. Continue to communicate and analyze.

An aspect of listening that requires attention from Ryan is to allow dissent. Mitch, Jenny, and Morgan each spoke about tense conversations with Ryan when his views were not supported. Clearly, this is an area where Ryan needs to step back and analyze how he manages his behavior so that his team members continue talking with him. If his employees are concerned about an argument each time they disagree, they will stop reporting and participating in conversations with Ryan. Similarly, even when agreement is not an issue, the leader needs to be receptive to problems that any team member brings without fear of repercussion. One of the great things that each of the leaders in the department believes is that everything will be all right if the team member brings a problem to them as soon as it is known. No matter who is at fault, the leader can be more helpful and supportive if he or she is aware of the whole circumstance as early as possible.

Other aspects of listening are fairness and consistency, which were mentioned by two team members as being important when dealing with potential problems. From one of them:

Consistency is important because people have to trust. You’ve got to allow for politics and bullshit because that’s reality. You know sometimes you can do things that make no
sense because you have to do things somebody way up the chain said to do, but consistency. I need to know what to expect when I go to my team leader.

Admitting when the system is flawed was brought up on a few levels and from different vantage points. One of Sam’s team members made a point two different times to say that of great importance to him was

open admission that there are problems is important, too, knowing that he is aware of problem and trying to find solutions to them whether or not he is successful is not so important as long as he is working on it.

To me it felt as though this team member wanted to prove that he was right, that the system was wrong, and that Sam, as one of ‘them,’ had to admit it publicly. It seemed disrespectful—as if he was trying to exert some power over Sam to show that he was actually controlling Sam’s behavior. I would not have expected this to come from this team member because I heard that he is very productive and conscientious. Perhaps Sam is closed-lipped about political issues and it not willing to bad-mouth department or university management to one of his team members as doing so may seem unprofessional. Perhaps Sam does not feel he has to tell the team members everything just because they think they have a right to know it.

The other vantage point was from Ryan, saying that he had to support decisions made above him whether or not he agreed with the decisions. His perspective was that it does no good to bad-mouth a project to his team or lower once the decision is made. To him, showing support and a positive spin on projects creates higher motivation and morale than bringing back a project and saying that he does not like it either, but it has to get done. The idea of supporting policy and projects that are passed down was woven throughout the leadership coaching and culture of the
department; I heard the same thing from Ryan down to Mitch. I suspect that Ryan would not appreciate having to admit that the system is flawed to one of Sam’s team members.

Accessibility can be a facilitator of boundary spanning. The leader should be available for the team members when there is a need. According to one team member, the “biggest problem is not being able to find the contact person to do [solve a problem] it right. But for a supervisor, just being there to listen to concerns at the time. That’s the number one thing and actually listen to them.” Being available to team members when a need is identified is important because being able and willing to hear what is needed can cover for a lack of process knowledge or intuition on the part of the leader. Morgan said that he would take a call from Sam “any time” and that “if they need me, we had a personnel incident on Saturday morning. They know where to find me and they know how it’s going to work—I’m going to get to them right away.”

The leader should “be involved, but not micromanage.” According to one of Sam’s team members, the leader should

stay on top of what your group is doing. Even brilliant people must drift—even with a general goal, will drift. [The leader] needs to ask a few questions that will keep people on track toward the goal, but yet don’t micromanage them to the point where they can’t be creative. Sometimes those side trips bring value.

While it may not have been true, or more likely understood, early in the computing industry, programmers can be quite creative. One could think of a programmer as an inventor or architect, trying to weave code to create some new outcome that has to include many parameters and constraints. To reduce the need to micromanage, the leader must recognize that there are many ways to complete tasks. The leader must also realize that when team members are developing new programs, the team members likely are aware of how the new program will
affect and be influenced by the existing system. Therefore, they need a voice in the scoping and development of new projects. Ryan does not know where the line between being involved and following a project to see if there is a need for his help and micromanaging the team so that things get done his way—specifically his way. When Ryan meets with deans and brings back projects, he needs to understand that dissent is assuredly not due to laziness, but to purpose and practicality of the new project and to the effects it has on other projects and on the existing system and the rules that govern the system. For example, one rule may be that once a project is scoped and programming has started, a manager cannot just insist on an addition, even a small feature, to the program without following protocol or without good justification for the change and team buy-in. Programmers all work with the same understanding of relationship of code in a program. If one person deviates from the project plan, the data passed will not be what is expected, so the other programmers receive something that may not work as expected—causing cost and time changes.

It is important that the leader create an atmosphere of community and belonging. According to one of Sam’s team members, “each staff member needs to feel important regardless of at what level. That goes back to motivation. It’s hard to be motivated when you don’t feel that what you’re doing is important or you don’t like what you’re doing.” One way the leader can create the sense of belonging is to show the team members that he or she believes in them. Sam’s team member offered the following:

Don’t be afraid to show your team you believe in them. You are the leader of the team, but you don’t have to be above the team. Be willing to be a part of the team. Let them know that you believe them enough that you are representing for the team. So, the team knows that you’re not just my boss, you’re the team. You’re the head of the team, but
each person is part of the team—each person owns the team. The leader represents the team—no matter what, not just when things are going well or the wind is blowing this way.

The leader should have enough technical competence to understand what is needed and enough about each of the team members to know who to ask for help. Team members talked of Mitch’s and Sam’s understandings of the job and the capabilities of the team members, which help when trying to find information or assign projects. I was seeing what I knew to be a very interesting and high-performing department. The people seemed to really enjoy the atmosphere and co-workers, both professionally and personally. I asked one of Sam’s team members about how this culture of competence, confidence, and fun could be franchised and moved to other departments and received a brilliant response:

Either you drink the Kool Aid or you don’t. People who want to sit at their cubicle and maintain the same 20 lines of Cobol that they have for the last 20 years and are just looking to ride this down for the last few years until retirement are not going to deal well with change and aren’t going to want to be under a bright light. And being in a team environment is kind of like being under a bright light because if you’re working that closely with people, they know what you’re doing; they know what you’re not doing. To an extent, you can create the environment for it, but unless the players want to play the game, I don’t know how you encourage that…. We’re lucky. We’re real lucky…. At times when we’ve lost people—we’ve had retirements—we’ve made some good new hires of people who came in with the right attitude…. I don’t know, you can’t force it, but I think probably the most important thing that has fostered it is the management team has shown that they believe in it. They have worked that way themselves. They got together
as a group and made some hard decisions and stuck behind one another and there wasn’t a lot of back-biting and political end-running going on at that level, and so they showed us this isn’t some bullshit management trend that we read about in a book, this is the way we are conducting ourselves and encouraged us to conduct ourselves that way too and to say You’ve got to break down this barrier of ‘they’re mainframe people, and we’re open systems people… what each is doing is irrelevant’ never was able to happen because they structured projects in a way that encouraged collaboration. That helps and is probably the best first step, but to an extent… you’re not going to walk into the mosque and say ‘Look at this cool Christianity thing’ because they’re all going to go ‘Yeah, right. Get out of here.’ You have to have people who are willing to buy into it and by leading by example. Showing people that you’re serious about it is a good start. There’s no magic here. The managers who are playing by those rules and are serious about getting things done and are going to hold you to account.. coupled with a strong group of people who are willing to buy into that and believe it. It’s funny because once you see it work, you feel like WOW, we pulled together on that…. It’s infectious.

The ability of the leader to see need and create a culture to reduce distance affects his or her ability to span boundaries for the team. Morgan and the management team have created one consistent place for the team to find resources outside their teams. Morgan said of Sam:

He goes to his other mangers because a lot of times it’s those people that are his external support. For instance, if someone is doing a server thing and it turns out that they need a Web assistance, he’ll go to Jenny or he’ll go to the programmer to see if they can work on the project. In this room, he might say, I need a Web resource to do this and she’ll say Okay, I’ve got three number one priorities that are due next week and after that I can help
you. If that doesn’t meet the schedule, I’ll offer… someone else out there. Sometimes you go outside the division.

So, as a group, they help each other to find resources beyond the ITS department. Being in one group brought quite a bit of complementary resources to each other manager, but they all had the same strong links (see Figure 13 A). To find something new, one had to use a weak network link that was not shared by the others as in Figure 13 B (Barabasi, 2003). By creating a space where each has access to complementary services on a regular basis, they have effectively reduced the distance to the external resource.

*Figure 13.* Weak network links find uncommon help.

Inspired by the data from the present study, Figure 14 walks through a typical boundary spanning scenario and shows where need and distance influence the outcome of need fulfillment. In Figure 14 the light colored boxes are aspects of need. Once a team member broadcasts a need, the external leader has to listen. The leader has to be open to anything the team member needs to talk about, has to be fair about decisions, and has to be consistent with the response. If the leader excels at the listening piece and is able to hear and recognize the need, we might say the leader has high EI. Boundary spanning is not some type of “external EI”. To further the boundary spanning, the leader needs to have technical competence to understand what would solve the
problem and must know who (if not specifically, then what type of person) to contact to resolve the problem. Here is a great example where Morgan heard the need for resources and included the team in the strategic solution:

I promised the department that we would never again hire a position without analyzing, quickly, what we needed. So, if we had four people doing billing and we only needed one, we didn’t replace the billing clerk [when one left the university]; we hired a server admin. We figured out the money and that’s what we do every time. We’ve lost eight positions in the last four years due to budget cuts, and we provide more service because we over loaded our Web people, we over loaded our server people and we have to increase it more with PeopleSoft….. We did a planning session in ’03 and identified ten critical positions that we are going to hire in the next four years.

The effective boundary spanner may not have a direct line to a solution provider; he or she will use a personal network, such as in Figure 13 B, to find that appropriate person to bring needed resources to the team. The managers use the staff meeting to find resources. When I asked Morgan what Sam does to find resources outside his team, he responded with the following:

We have access to Gardner, and faculty members… He might engage in conversation to pick what he’s looking for. And projects—all of our projects are intertwined. You need a Web programmer, need a server person, and an applications person…. So all of it works together. They’re all in meetings together.

If the decision is made (by the external leader or a superior) not to meet the need of the team member immediately, the leader will help the team member create a plan to solve the problem in the future or in another way.
The dark colored boxes in Figure 14 are aspects where distance can negatively affect boundary spanning. When a need is broadcast by a team member, the leader must be available to hear or see the need. Whether or not the need is recognized, the leader must not be closed when there is dissent from his or her opinion. If the need is not recognized, it could be because the leader is not involved enough to know when there is a problem, unavailable or is too busy to help the team member, not open to discuss problems, or makes the team member very aware of the social or power differential. Some of the causes that might inhibit the leader’s ability to
recognize and help fulfill need are lack of engagement with the team or the individual team members, high physical distance (literal or virtual), extended time between communication occurrences, high social or power distance, lack of a coach or role model for the leader himself or herself, no sense of community, and lack of understanding of the method of communication or language of the team member.

As a leader it is important to identify both individual and environmental characteristics that could be prescribed to facilitate external leaders’ boundary spanning. The word “prescribed” is specific to the individual nature of organizational culture. One size does not fit all and a facilitator to boundary spanning in one organization may be a restrictor in another. For instance, in a flat organization, it may be easier to reduce social and power distance than it is in an organization with many levels. Also, in an organization where virtual teams and leadership are utilized, physical or virtual distance may be difficult to reduce, not because it is hard to contact the person, but because team members or the leader may not be comfortable substituting physical contact with virtual contact. The managers communicate by text messaging quite often. During my first interview with Jenny, Sam sent her a text message while he was in another meeting. While Jenny did not react to the message while I was with her, she did take the time to read it carefully.

A facilitator at one time for a leader could also be a restrictor to boundary spanning at another time for the same leader. For example, Jenny described a case where she had to defend the way she leads her team to Ryan regarding an employee who does not arrive at work early everyday. Initially, Ryan wanted Jenny to make the team member toe the line. Advice on how to relate to and control her team member was unneeded (because she had an understanding of why the team member arrived late that Ryan did not have) and unwelcome. The same behavior from
Ryan would have been welcomed by Mitch because he needs better understanding of how to deal with some of his team members. This would have been seen by Mitch as coaching and a facilitator of his ability to take action. Another example is of the continuing problems with a couple of Mitch’s team members who are not hard workers, a couple of Sam’s team members who are not working at the same pace as the rest of the team, and Mae’s team members who defied the near mandate by Ryan to participate in this study. The different configural effects of distance affect the leader and team member’s ability to communicate and develop the leader’s ability to identify and meet team member needs. Need does go both ways. The relationship is not one-way; the responsibility of the leader is to see the need. Sometimes the leader relies on the team to fulfill needs that help him or her continue to improve the need fulfillment. Such fulfillment could be as simple as feedback or making the leader feel like a welcome part of the team—included, valued, understood.

Prescribing an environment that facilitates boundary spanning may be easier if shared understanding and training behaviors are created from the bottom up—that is, from the team to the leader to the broader organization. Individual characteristics that could be prescribed include work on emotional intelligence, and an understanding of what boundary spanning means and how it influences the team and work processes of the individual team members, organizational work processes, and interorganization work process. Working from the bottom up would allow for individualized coaching to help build the individuals that make the team and to help the team as a whole. An example of this is a defensive back coach for a football team. Before practice, the coach builds a rapport with the individual team members so he can make sure they are ready for play. This readiness includes training of the position, interposition relationship understanding, and interpersonal relationship building. During practice, the effective coach works on basic
position requirements of making sure the player is in the correct stance and ready for action, is actively looking for nuances and trends to create an educated guess of where the ball will be, where to be when the ball does get there, and then having the heart and intensity to work hard on every play. The effective coach does not yell during a game; he coaches in a calm manner, looking at what is, not what was. The yelling might happen during the next practice, but only about low intensity. Players know the game or they would not be playing. Low effort drives the coach crazy. When effort is up, the rest of the team can count on the player to be in the correct position when and how needed. It is easy to see that need of the player would go up and down. The coach would need to have developed the relationship with the player to know when need is high, especially when it is not just about knowing where to be. Once the position and effort was established, the coach would work on the relationship between players and plays that require that each player understand their position in relation to the other. Finally, with experience playing together as a team, the coach could create plays and be sure that each will not only know where to be and when, but they each have the experience and understanding of the game and position that when a new situation happens, they each know the appropriate movement. When I asked Morgan what Jenny does to build her relationships with team members, he responded with the following:

This team... we work on our skills. This lady goes down in the trenches, she treats the people right. She knows what to say when the people need to hear it, when to pat them on the back. She has a little bit of trouble being tough when she has to because it’s not natural to her, but she does it. So, I think the most important thing she has is respect from her people, which is what all of our people have. They all have respect from their people.
The three legs of leader distance—physical distance, time distance, and social/power distance—can be configured for individual team members, and to the team as a whole, to facilitate boundary spanning. Need must be understood by both the leader and the team members to focus communication on what resources are required and how. Need is the two-way communication that tells the leader (through human or process understanding) what and how resources are needed and distance is the aperture that either enables or restricts the ability for the communication about the need to happen.

Case Study Comparison

The external leaders chosen for participation in Phase II of the study were selected based on their boundary spanning scores. Research question 8 asks how these three case studies compare, quantitatively and qualitatively. Their self and other scores (before alignment) across the clusters of boundary spanning were in line with their professional experience, from the most years to the least; Jenny had the highest scores (6.20 for self, 6.42 for other), followed by Sam (5.04, 5.85), and then Mitch (5.53, 4.90). Both EI and BS alignment scores for Jenny were each close to zero (-0.00 for EI, -0.22 for BS), which is unusual as she is quite alone in that position (see Figure 8). No other external leader who participated in the quantitative phase of the study claimed alignment scores that were as close to zero as Jenny did. This result could be attributed to her consistency and longevity in the organization. Sam’s boundary spanning alignment score (-0.81) shows that he rated himself quite a bit lower than his “others” did. It is also a large 1.44 points away from Mitch’s BS alignment score (0.63) and 0.59 points away from Jenny’s (-0.22); Mitch’s is 0.85 points away from Jenny’s. Sam’s alignment score could be explained partly by the shortness of time he has had with his team. But the alignment difference for Mitch could not
be due to his unfamiliarity, as he is a former member of the team he now leads; he is simply new to the position.

There were a few score differences that moved the alignment positively or negatively for both Mitch and Sam. Mitch had a self score that was 1.80 points higher than his “other” score for the Building Team Trust in the Leader competency. So his alignment score was strongly affected by one competency and is one reason his score is so high in the positive region. While his self score was on par with the other external leaders, his “other” score was the lowest of any leader. This difference may be due to the power issues that he is struggling with or it could be due to the fact that he has created further distance between himself and the TSSs by creating another layer of leaders who now prevent Mitch from having to interact with the non-lead TSSs on any regular basis. He may not be aware of the needs of those team members and they may not have any meaningful opportunity to share them. Mitch also said that he relies on someone who works nearby to the TSSs (but does not work for Mitch) for information because she seems to have the trust of the team members and she hears what is going on.

Sam had a self score that was 1.40 points lower than his “other” score for the Seeking Information in the Broader Organization competency. There could be a couple of issues here. The first is that there was only one item measuring this competency (question 32, which did not load strongly on the factor analysis). The second issue, and the one I prefer, is that Sam’s “others,” including Morgan and Sam’s team members, are well aware that Sam meets often with Morgan and Ryan. Mitch does not have nearly the same access to the upper management world. He only has access to Jenny. Jenny does have access to the same network as Sam, but she is not in management development mode. Perhaps Jenny’s team sees her as a supplier of information to upper management and Sam’s team sees Sam as a receiver of information from upper
management. The management team meeting is also well known and does give access to others from different areas in the organization. It is strange that Sam did not account for that access; perhaps he does not value it in the same way as Ryan and Morgan.

The main differences in their positions in the department are that Mitch is being developed by Jenny, with some help from Sam, while Sam is being developed by Ryan, Morgan, and Jenny. There is a big discrepancy in their attention. Since Jenny spent several years developing Sam before his promotion, if Jenny stays around for a few more years, it is quite possible that Mitch will look quite a bit like Sam and could be ready for a management position next to Sam. If Morgan stays for several more years, Sam may decide to leave for a higher position and Mitch could slide into the development spotlight. Jenny said that she is very happy with Mitch, so he must be accepting and using her coaching. While Sam has the spotlight position, Mitch does have the exposure to, and is scratching the back of, the executive level leadership who may take notice, and he is being developed by Jenny—he may be drafting, but watch for the pull away.
CHAPTER IX. DISCUSSION AND CONCLUSION

The purpose of this study was to identify the personal and organizational characteristics that facilitate and restrict boundary spanning (BS) of external leaders. The study was a two-phase sequential exploratory mixed-method study. The first phase examined the relationship between boundary spanning and emotional intelligence (EI) of external team leaders. Through interviews, the second phase explored individual and organizational characteristics that facilitate or restrict boundary spanning in external team leaders who scored differently on boundary spanning than predicted based on emotional intelligence scores.

Bivariate regression and correlation showed that boundary spanning is strongly related to emotional intelligence. Three external leaders were selected for Phase II because they had nearly the same EI alignment scores but very different BS alignment scores. I wanted to know why, if EI and BS have such a strong relationship, the BS scores of these three leaders were so different. Qualitative data from 14 interviews revealed that leader distance and need are both facilitators and restrictors of boundary spanning. Boundary spanning is not just something that the leader does for the team. Boundary spanning is important based on an individual’s need. If the need is low, the leader would offer less help and, therefore, the appraisal of the leader’s boundary spanning would be lower. Also, the leader must understand when there is a need and how to react to the need by offering the appropriate help for the appropriate duration. The ability of the leader to understand the need of the team members requires relationship building. Relationship building is made easier when the leader distance (physical proximity, social distance, and perceived occurrence interval) is low.

The remainder of this chapter includes distance and need revisited, the CIO and situational appreciation, and future research and the team leader questionnaire.
Distance and Need Revisited

Recognizing and Acting on Need

Boundary spanning may not be required by some team members or even some teams that are very self-sufficient. If the need is low, no matter what the ability of the leader to span the boundary to support the team, the leader would have low impact on the team or perhaps even negative impact if the leader intrudes in the team’s work at unnecessary times. An example referring to need came from a team member of Mitch when I asked about how Mitch is able to empower the team: “I wouldn’t say there’s a lot of animosity, it’s more like ‘Leave me alone, Mitch, I know what I’m doing.’ That kind of feeling.”

If the need is high, leader distance should be kept low, and the leader is capable and effective at spanning the boundary, then the effect on the team is higher and more of a factor in team success; self-regulation would be a competence required to identify a need. For example, Mitch’s need for coaching from Jenny is high and the leader distance is very low (they have close physical proximity, very low social or power differential, and very frequent communication), which helps Mitch practice dealing with clients while being protected by Jenny. Jenny is coaching Mitch to create his own experiences and style with her help, but is not taking care of the problem for Mitch. Also, she is not making him solve problems in the specific ways that she would do it—it is Mitch’s way, but with Jenny’s guidance. This allows Mitch to model and build positive references for self-regulation while building self-efficacy about his own emotional intelligence and situation awareness for boundary spanning. Mitch is learning about the relationships he needs to make across campus and how to balance customer service with a happy and technical staff that works together as a team and as part of a greater team (e.g., help desk). He is building situation awareness by learning how increasing customer service affects
how happy his team is. For example, if he sticks up for the client at the expense of the TSS, how are other customers affected by the TSS or others who hear about the rumored preferential treatment of customers over TSSs and then have to serve other customers? This is a balance and Mitch has to continually find and align with the horizon line. Mitch has to call clients to say that changes to the operating system will not be supported or are not allowed per standard procedures for security and practical support reasons—we only have so many TSSs, so we need to ensure that everyone has the same basic system. Mitch calls many of these clients while sitting in Jenny’s office. This only happens because there is low leader distance; he feels comfortable to go in and ask for help—often. Mitch is intentionally getting coaching from Jenny. Jenny lets this happen because she is aware that it is a high need time and that Mitch has a short window of opportunity. She understands that there is a need and how to handle it. She has already established a low leader distance, so the environment is set up to facilitate boundary spanning. If Jenny were not aware of the need, or had high leader distance, several unintended consequences could occur such as poor modeling references made and used by Mitch, poor customer service decision making because Mitch may not be able to think through the reasons for some decisions, Mitch may not consider how the decisions affect his team and the organization, Jenny may not understand how Mitch is affecting her support system as a team within a system and within the broader organization, etc…. So, reducing leader distance is required to create an environment to facilitate boundary spanning. Recognizing need and understanding that is has finite time parameters and opportunities to help are important.

Recognizing and acting on need in human relationships is a nuanced and expressed talent that is made better through experience. An example can be made with an illustration of technology. Radio frequency identification (RFID) is often used as an inventory tracking
technology (Prater & Frazier, 2005). RFID can be a small tag attached to an item, like a bar code that has electronic data stored on it but does not emit information; it just holds information that is read when it passes through an electronic reader. RFID uses passive technology. When the reader hits the RFID, it turns on, sends data, and turns itself off. For example, a bunch of microscope slides that have RFIDs are stacked together in a box. When the box passes through the reader, each one turns itself on, sends data, and turns itself off. Each knows when it has been read. This is important because we don’t want the same slide being counted two times. Once the data are retrieved, they can be used to complete the transaction (e.g., tell system that the slides are accounted for, exactly what is on each slide, where it is, or should be stored, and any other required information). The RFID carries more information than is needed at any time, but only sends what is requested.

For another example, grocery stores have been working on a concept of practical RFID. There is a need for customers to get through their shopping quickly, easily, and accurately. There is a need for the store to continually have stock, track inventory, ensure accuracy, and make a user friendly experience for the customer. Imagine walking the aisles of a grocery store and filling a cart with supplies. When you are ready, push the cart through an archway and receive your receipt at the other end. Each item in the cart contains a small RFID (sticker). When it goes through the arch, an electronic reader turns on each of the IDs, reads all the data on the RFIDs, and then hits a software switch within each RFID that turns them off so they stop transmitting. The transaction may include automatic reading of the customer’s credit card. The turn-off is important because neither the store nor the customer wants one thing to be scanned multiple times; that throws off stock and accounting for the store and over-charges the customer. The data from the RFID adjust inventory, automatically create an order to replenish stock, increase sales,
and track customer buying habits. The result is a store that controls inventory, ordering, accounting, theft, and customer service. Another result is a customer that can easily complete shopping—no waiting in line.

This concept can be applied to boundary spanning by using the team leader as the RFID system (RFID, the reader, and the system they support) and the team members as the customers. Take this idea to this study and team leadership. In the case of need, the leader has to passively but constantly offer help. This can happen through communication with the team, letting them know that help is always there waiting, the types of resources he or she can offer, how he can offer the help, protocol for asking for it, etc. The help is constant; it’s just waiting for the signal which can be from the team member asking for help, through EI, the leader reading social cues and acting upon them, or technical experience that helps the leader know what the process should look like and when it needs help getting back on track. When the team member needs help (near the top of the hill) he or she will tap the leader for resources. The leader needs to identify the tap, give resources, and then turn off (to constant mode). Outside the important time of need, offering resources wastes time, because there is no place to keep or use the offered resources. The key to the constant help (as in a light switch, the electricity is always on at the switch, but the switch has to be flipped to accept the electricity, then flipped again when it is not needed) is recognizing that the help is constantly available, yet is not always in contact, or in high need.

The horizontal parallel lines in Figure 10 show constant leader help. Constant help means that it is always available to be used, but constant contact means that the help is always being given. It does not matter whether the constant contact help is at a high level or a low level because the constant contact is the problem. When the help is activated, but not needed, it can be seen as micromanaging; when it is needed, it is helpful. There is a time and place for leader help.
The key is the communication between the team and leader. Whether spoken or not, the team has to know that the help is there and how to ask for it and the leader has to know both that the team is asking and how to help. A more effective leader will have the EI and technical expertise to pick up the cues of need—both human (knowing from the team members behavior or tone of voice that they need help) and technical (either knowing how the product should look at certain places, or knowing that at a certain part in the process, other resources are generally needed, so the leader can insert himself or herself at that point). Both of these are nuances that are recognized through experience and through EI. While the leader must recognize the call for help, the team must recognize and be able to utilize the help when it is given. Communication and training help reduce this gap. For example, if a leader supplies help in the form of a financial budget, the team member needs to know how to work with the budget (i.e., forecast, access and release the money, track true costs, buffer for overrun, and reporting). It should go without saying that the external leader’s ability to see and act on team need affects the superior in positive negative ways. Superiors of external leaders should address leader distance and need throughout the hierarchy in a cascading fashion so that boundary spanning can happen.

Is need necessary for boundary spanning? I believe need is measured separately from boundary spanning, but boundary spanning creates readiness and ability to meet needs. From the perspective of the leader, the competence and capacity to help a team when needed requires that he or she continually adds to the set of resources. Even when not actively helping a team, the leader should be making contacts, learning who does what and how it could apply to benefit the team at some point. At the same time, building a rapport with team members, while it is a boundary spanning competency, does not require that the leader do something for the other—a side from lowering the distance between leader and team member. Building rapport would
make the team member more comfortable to approach the leader when there is a need and to communicate to help tune in the specific type of need.

From the team member’s perspective, the leader has a need to understand the project development process so that the team member would not necessarily have to ask for help explicitly. And when help is requested in any way, the leader should have a good understanding of what would fulfill the need without having to rely too heavily on the team member when the need for help is highest—when the team member is already taxed by the project. It is also important to consider that at the upswing of need, the need may not be for resources at all, but for coaching that will help guide the team member through the rest of the project and the resources he or she already has. For this particular reason, the leader distance must be low and the leader must be aware of these opportunities because these are low cost, high impact needs; they create experiences that benefit the leader, team members, and all future projects.

Collaboration

Boundary spanning and emotional intelligence work synergistically to enable the leader and team members, together, to understand, communicate about, and fulfill needs. Without understanding the culture affected by leadership distance and without understanding the relationship between need and leadership, boundary spanning has less effect on leader and team effectiveness. This study adds to the boundary spanning, leadership, and project management literature by adding the important identification of need as the moderator of effective boundary spanning. Managing need is a negotiation between the leader and team members—collaboration.

One of Sam’s team members referred to collaboration four times during our interview. When I asked how Sam does to get information from the team and outside, he said:
Well, you know, the thing about our group is that we’re a very open group. We collaborate a lot so the biggest thing that he does…it’s not the only time we talk about these things is in the formal meetings, but we do have those touch points where if you’re out in a user office, you know you have that base to come back to where you can get filled in on things. We communicate a lot about what we’re working on; we collaborate a lot about the things we are working. If there’s a project coming down the pike, he has a whole lot of one-on-ones and then whole group comes into phase by general communication among the group more as a formal setting. It’s kind of multi-tiered, so those meetings are not the full means of communication, but they are a set touch where you can get into what’s going on. He started this idea of having the wider area meetings were everybody has a chance to know what…because he has disparate elements under his charge, so putting those bigger meetings together gives us an overarching scope….That whole management team group and all… they are very collaborative.

Jenny expressed her attitude about working as a team with the following:

I don’t focus on myself, it’s not about improving me, it’s about improving the department and we have things, initiatives, that need to get done for the university and as long as I keep track or keep sight of the fact that whatever I’m involved in, if it’s right for the university, then, I don’t let go of that. Because it isn’t about me and it isn’t about the department necessarily, it’s about making this place function as part a group or the rest of the team.

During my interview, I asked Jenny what makes it difficult to get information or resources from others in the organization that her team members can use. She said:
Sometimes it’s a control thing. Sometimes they want to control the information or the outcome of a situation and that makes it difficult for me to participate either as a member of the superior team or with the rest of my team. So, a lot of times it ends up being a control thing. I don’t always feel that they are out for the good of the university.

Collaboration requires aligning projects and people with one shared vision (Leinonen, Jarvela, & Hakkinen, 2005). Ryan said that all projects are aligned with the university mission and strategic plan. Successful collaboration requires shared vision and clear understanding of organizational needs, goals, and objectives. Two-way open communication is needed to allow people to try out ideas and allow for creativity while working toward a common vision. Misperceptions waste time and energy, which often stall progress and likely end the collaboration and splinter the collaborative group. “Shallow understanding from people of good will is more frustrating than absolute misunderstanding from people of ill will. Lukewarm acceptance is much more bewildering than outright rejection” (King Jr., 2000, p. 543). Such misperceptions could be prevented by educating for situational appreciation of all parties; to appreciate the situation from the other’s perspective. And open communication to flesh out what is intended versus what is understood. Creating shared understanding of vision, strategy, and tactics takes time to communicate the full scope of the vision and answer (or find answers to) questions to allow people to identify their own place.

Collaboration requires allowing people the time to find their space within a vision or project. One of Sam’s team members whom I interviewed has been in his position for fifteen years as a Unix programmer. He is very aware of the environment and the relationships within it. I have no doubt that he could be a successful leader, but instead has remained a programmer. He
is not defined by title or turf. He has a wall full of music CDs, a banjo next to his desk, and his
desk faces out the window. He has created a very comfortable place to work and play.

Collaboration also requires creating a trusting environment (Parker, 2000; Tschannen-
Moran, 2001). Morgan said that Jenny’s most important qualities are trust and respect that she
has from her team members. During my first interview with Jenny, she answered most questions
with reference to listening and building trust in her from her team members as an important focus
of her leadership style. Trust goes to many layers of collaboration: trust that the other will
reciprocate with work, care, and responsibility in the relationship; trust that the collaboration will
benefit all parties; and trust that the leadership is transparent, to the extent that the leader can be,
and without deception. Withholding important information is a part of deception. “Lying and
deception are equally harmful to the person deceived, since they deprive him of information
rightfully his. …whether one plants false beliefs by means of lying, or by means of evasive or
misleading statements (or actions), is a question of means, whereas morality judges by intentions
and consequences, and lying and deception are done with the same intention and (if successful)
have the same consequence, namely, that someone is wrongfully made to have a false belief”
(Ellin, 1988, p. 132). An example of withholding information that would be considered
deception in a programming context is when a superior inserts a project into the production plan
with the claim that the president needs it. All production on other projects slides back to
accommodate an immediate need of the president. The fact that the superior inserted the project
means that he or she is aware that there is a protocol to get a project onto the plan and that there
is a ranking based on need. If the team later finds out that the president said there was “no
hurry,” and the team looked bad for not completing their other projects on time, or someone
skipped a vacation to work on the project. The intent of the superior was to ensure that his
project was done, and to look good to the president at the expense of the development team. He or she may think of it as a team and that their time is not important, but to each team member, there is a process, and more importantly in this instance, there is respect for the individuals on the team who were personally misled. The team would not welcome the superior and would doubt the truthfulness of all claims until trust is reestablished. This scenario could be avoided by establishing norms such as anything from the president has to be done within one month or, better yet, the superior could have told the truth—“there is an opportunity to look good by providing good customer service response; I’ll get you more resources, please help this get done as fast as possible.”

Collaboration requires engaging a shared process (Higgens, 2000; Leinonen et al., 2005). The management team studied here has a well established management meeting each week where each participant can ask for resources, brainstorm for new ideas, discuss process problems, or just relate to each other on a social level. They all know that when they go to the meeting, they can have a list of issues to discuss, or nothing to ask, but only to participate—and nothing leaves the room. This is the way they have decided to collaborate, and it has served them well. They have become a very cohesive group, so much so that Jenny, who is also a director, prefers her group contact position at the management level.

Collaboration requires aligning behavior to appropriate intrinsic or extrinsic reward (Simatupang & Sridharan, 2005). If we want to see interpersonal, interdepartmental or cross-functional collaboration, we need to create access to other functional areas and reward the collaborative behaviors and group accomplishments (Senge et al., 1999). Rewards could be intrinsically driven based on sense of community and group identification, interpersonal relationships, or satisfaction through helping another. The management team is all about intrinsic
reward. They develop interpersonal relationships and are recognized throughout the department as part of the “management team” which does have some aspect of celebrity. Extrinsic rewards would include attaching compensation to collaborative behaviors, making sure collaborative groups can be successful for both parties, and making collaborative work easy. For example, letting existing team members help to select others in the department as when representatives from various teams create a hiring team to do the initial screening of new employees before it goes to the next level, where Mitch, Jenny, and Morgan conduct the second round of interviews.

A word of caution to the negative effect of using money as a reward is necessary here. Jenny said that Sam was going to take a position outside the university because he wanted higher position and pay; so Jenny got Morgan to increase his salary. This form of a bonus is often played out by employees in an effort to increase salary. The problem is not so much that the person is trying to increase his or her salary, but that he or she believes this is the only way to get the raise. The more far-reaching problem is the message the gesture sends. Morale is lowered when the leaders allow one person to, for all intents and purposes, “blackmail” leadership into submission. The others who do not go looking or threaten to go elsewhere, and who are very good employees without the raise are punished and devalued despite their loyalty.

Collaboration requires developing emotional intelligence to enable people and groups to relate. Collaboration requires emotional intelligence to go beyond simple transaction to a collaborative relationship. For collaboration, all parties require EI to understand the other and manage the relationship (Goleman et al., 2002). Just as each university professor may not make a great college dean (some are better at teaching and research) and the best salesperson may not make a great sales coach or manager, some people are not well suited for collaborative work. The ability to select people who will get along well may be important to completing work
without de-energizing behaviors. People who are high performers tend to be energizers; energizers and high performers tend to attract other energizers and high performers (Cross & Parker, 2004b). Depending on the balance of identity of group and self, an individual will see issues and events with a different perspective and “social identities may influence appraisals of issues and events” (Garcia-Prieto et al., 2003, p. 413); therefore, EI is required to understand when people are uncomfortable and try to bring out the reasons to share the understanding. One who has very high group identity may be unwilling or untrusting of an out-group person and less likely to collaborate based on false or outdated assumptions. One of Sam’s team members said that there is no longer an “us” and “them.” That there is now a lot of collaborative behavior now that Sam brings the various teams together

Collaboration requires creating an environment that makes collaboration practical and purposeful (Simatupang & Sridharan, 2005). During my interview with one of Sam’s team members, I asked about the interesting and competent mix of personalities that make the group very effective, and he responded that the core management group has come through some upper management transitions that were difficult and they banded together and trusted each other...It wasn’t always that way. I’ve been here for 15 years... even with Nick. When our previous CIO came in, she made some really dramatic changes in the climate here and Nick got put into control of this area and... shortly thereafter I lost all of my team members. And I was the only member of my team and Nick just encouraged that whole team concept and nurtured it and showed that it could be really effective by sharing with people on the management team who went through all of that, that kind of thread. And so, many initiatives that Sam ran downstairs [while in the position that Mitch now holds] that he had to put before the tech
support staff [TSS] grew on that same basis and I mean that it has grown in a natural and organic way throughout the department and I see it starting to take hold a little bit on the second floor and I think the project [that Nick is on temporary assignment to run] has spurred that because we’ve got this huge, multiyear project that everybody has to have a piece of and everybody has to work together and the core team members being over there and working together and now we’re still overseeing that .... That whole team thing is dawning on a lot of people who might not have used it before, but yeah, Morgan is an encouraging people person and a strong presence. Yeah, it’s grown and spread in an organic manner and … it’s a good thing.

Arranging the environment is one thing leaders would like to be able to do as part of creating a collaborative culture. Part of the responsibility of a leader of a collaborative organization is to make the expertise of the individuals known so others are able to identify whom to contact as a possible collaborator or as a resource (Hara, Solomon, Kim, & Sonnenwald, 2003). An important complement to knowing who has specific knowledge and can be used as a resource is the creativity to see how different niche areas of expertise can be combined in a synergistic manner (Cross & Parker, 2004b). While organizations cannot make people become friends, it is possible to make occasions that bring many people together that might facilitate social networking. For example, Sam brings all of his teams together on a regular basis to help them all understand their roles and how they fit with the roles of all the other teams.

Collaboration requires hiring people who like each other and have the ability to self-select into groups (Hara et al., 2003). Jenny hires people based on personality because she said she can always build their technical skills. Mitch is a great example; he has a masters degree in education and Morgan said that they are proud that they have people who from outside the ITS
world. During my interview with Morgan, he spoke very little about any technical skills, except to say that people are technically competent.

Collaborative work is higher in time commitment early in a project when scope and assignments are considered. The idea of collaboration is similar to change because the nature of collaboration is two or more people coming together for a project (a defined deliverable with timeline, budget, and quality expectations) and then separating after the completion of the project. Senge (1999) said that people need to have time to think about and practice new behaviors. This suggests that the start-up for any new initiative is slow.

Collaboration requires boundary spanning and vice versa. Druskat and Wheeler (2003) found that highly successful external project team leaders consistently empowered (allowed freedom in what and how things were done), persuaded (motivated), related (enabled cohesion), and scouted (found information about the group and the organization) for their project teams. They called this spanning the boundary of the team and the organization. These activities apply here because an external leader, such as Ryan, has access to the university community at a high level, is a hierarchical person who can act as a coach, can find resources that the team needs, and is in a position to motivate people to collaborate.

Collaboration requires good project-level and program-level leadership. Schultz, Slevin, and Pinto (1987) classified critical factors of projects as either strategic or tactical. Strategic factors include management buy-in, planning, thematic subject release (e.g., Ryan said that all ITS projects must be aligned to the strategic goals of the university), and program marketing—things that increase external awareness of and planning for the program. Tactical factors included aspects like project team training, team member selection, and process (Belassi & Icmeli Tukel, 1996). Tactically, all of Jenny’s reports work to create the net or system of support. This relates
to collaborative behavior because creating an expectation from outside of the team would help to create momentum and group identity for team members. Careful team member selection and norms for collaboration are important to success. Avots (1969) identified three reasons for project failure: wrong choice of project manager, unplanned project termination, and lack of support by upper management. Lack of support by upper management is a symptom of strategy and the reward system that is incongruent with performance. Human performance is a large part of collaborative success (Belout & Gauvreau, 2004; Cross & Parker, 2004b).

All people involved in a collaborative initiative or project must have a stake in successful completion. Identifying such an individual stake requires a negotiation between people as they find their position in a team. Farrell (2001) calls these collaborative circles and describes these as a “set of peers in the same discipline who, through open exchange of support, ideas, and criticism develop into an interdependent group with a common vision that guides their creative work” (p. 267). Those people who are high in collaborative behaviors will naturally attract other people who are collaborative. The first thing Mitch did as a supervisor was to divide the TSSs into work teams. He did so for three reasons: (1) To make fewer points of contact for the supervisor, (2) to force the TSSs to spend more time engaged with each other, and (3) to help the TSSs answer questions more easily by creating teams based, in part, on complementary skill sets. This has been somewhat challenging because of the make-up of the teams; however, they have been successful from a productivity standpoint. If Mitch could replace a couple of the team members, he could select people who are more socially interesting and would create social network hubs (Cross & Parker, 2004b).

The leader must understand and reduce distance on an individual basis because the synergistic effects of team work are greater than the sum of individuals—together, a team can do
more than each one individually. The team will develop a process and individual team members must be free to add creative nuances to increase efficiency and effectiveness of their work. This requires help from the leader to get the resources needed to practice the new process and identify whether it really benefits the individual and group process.

The CIO and Situational Appreciation

Thus far, the discussion has only focused on relationships from Ryan on down to Mitch’s team members. It is important to take some time to understand that Ryan has a difficult role that may not be obvious to everyone below him, yet the role he plays affects his relationships with them. Ryan has to continually balance competing values in two primary relationships. First, he has a relationship with the executive leadership above him, who want him to control his staff to develop and support the university IT projects with consistent quality and in the shortest time possible. He is pressured by his superiors to complete projects that are handed down without concern for capacity. Ryan said that he can offer his opinion, but once a decision is reached, whether he agrees with the opinion or not, he will support the decision. He also said that he does not complain about the decision to his team. He is clearly aware that complaining about directions from above him could cause some discontent among teams in his part of the organization; saying that it would hurt morale if he complained is evidence that he has weighed the consequences of each. If he has decided to make a rule of not disclosing his disagreement with a decision that his superiors insist that he enforce, he likely has some anxiety in not being able to share that frustration with his directors.

Second, Ryan also has a relationship with his reports that is different from the one he has with his superiors. To his reports, he has to be supportive, visionary, and empowering. Although he has to listen to people complain about workload and resources, he likely would not voice any
of the problems he has with his team members to his superiors for fear that they might think he is unable to control and lead them. He is stuck between two sets of people who complain about the other or at least do not understand the perspective of the other. Situational appreciation is not only situation awareness, but it is trying to understand an issue from the other person’s perspective (Bricker, 1993). For example, resources are being reduced from the state, so at the very top of the university, budgets are being cut, which creates competition among Ryan’s superiors. Ryan’s team needs to understand that there may not be resources for Ryan to get—lack of resources may have nothing to do with him. Ryan is in an interesting position and his view might be one of being stuck between two competing values. He is in an interesting position where he could view himself as being on top of a fence that separates both sides. He could create opportunities to pull both sides up to his place and in seeing each other, they might both learn something about the other. Ryan is in a good position to facilitate their communication.

Two problems that were discussed a few times are the feeling that (1) Ryan goes out to meet with people across campus and returns with projects to pile on the existing ones and (2) Ryan does not allow dissent from his own perspective. The first problem stems from several possible causes. First, Ryan is too worried about pleasing the public and making himself look more important to the university’s central administration by taking on an unrealistic amount of work. Second, Ryan really does not communicate well with his staff to understand their true capability and capacity. Third, Ryan generally does not listen to his staff to understand where there are problems and, therefore, the staff stop telling him what the problems are and now he has what Byrne (1991) would call “CEO disease”. Finally, perhaps the board of trustees, president, and executive vice president consider ITS to be producers of a commodity—to be planned as a task list without understanding that each project requires team work, each initiative
requires multi-unit coordination and the fulfillment of the strategic goals requires leadership, not management. I believe the cause of this problem is that he is not aware of the capacity of the team. When asked how he balances capacity and requests from outside, Ryan said, “In my job, you don’t have to know how to do all of their jobs, but if you try hard enough, you can figure out how to do it even if you do it badly.” When capacity is spread thin, quality goes down. If Ryan does not understand the true capacity and the implications of the stress (new projects and their complexity) added from outside meetings, then he can just throw out a number and think it is okay to use as capacity. It is as if he programmed one smooth project and, in his head, is using it as the benchmark of time and cost for all other projects. He plans incorrectly for some projects and has a problem when projects are late or, more likely, is not involved in the planning of projects and so should not be talking about scheduling with people outside of his teams. Of course he does not like dissent; his logic is sound, so he needs to make sure everyone else follows his logic.

The cause of the second problem is one of detrimental attitude and habit. A dog stops going near an invisible fence to ensure there will be no painful shock. People who get yelled at for crossing a boundary, through what they thought was healthy dissent, will stop voicing dissent and the person who suppresses dissent no longer hears it and believes everything is okay. Jenny and Morgan both said that they are not free to disagree with Ryan. Clearly the rapport that Jenny and Mitch have has allowed this fear to get to Mitch; he got nervous just talking about meeting with Ryan.

Ryan seems like a good speaker and I doubt that he would be comfortable increasing the “push-back” to the executive team when they make decisions he disagrees with. So, while it may not be practical or easy, given his past behavior of keeping his personal thoughts close, Ryan
may do well by doing two things. First, he could talk more openly with his team and allow his voice to match with theirs when there is a reason to disagree with decisions made by people who do not really understand IT, yet are making decisions that affect the resources, policies, and procedures of the IT department. Several of the team members talked about having to create a rationale to get some type of resource; perhaps they could be more involved in creating the rationale that Ryan presents to his superiors—at least more parameters for their decisions. Second, he could take the other role and talk more openly with his superiors to educate them on the competence and capacity of the department as it is. These might at least create a bit of understanding by superiors and teams about what he has to deal with and why the other is pushing back.

Future Research and the Team Leader Questionnaire

Follow-up Studies

Future research to follow-up on this study would include going back and finding out why, to the person, one of the groups did not complete the survey. I suspect there was more than the fear that their electronic information could be traced. This is a group of programmers and I suspect that if they wanted to ensure information was secure, they could have. Morgan said that he was trying to change the culture of that team by incorporating some members into other teams. It would be interesting to identify the social and power influences in that team and create a development plan to turn the culture to one of positive rapport and collaboration.

Follow-up would also include going back to Mitch and Sam in two years to identify how their leadership perspectives have changed, what they attribute to the change, and what they find to be the biggest challenges. The organization will change when Jenny and Morgan retire. Identifying the new social structure, distance, and need in the new environment would be
interesting. Losing the social hubs will likely create splintered teams and will return to silo mentality, at least temporarily. Mitch and Sam are working on technical competence while, at this point anyway, not proactively building their ability to solve interpersonal problems within their teams; so they may not have necessary experiences to draw from. If Morgan and/or Jenny leave, there will be open spots in the Manager and Director levels. If Nick stays longer, to help continuity, he will likely keep the director-level spot and the social dynamic will certainly change because he does not have the coaching talent or employee-centered leadership style that Morgan or Jenny has. If Sam does take Morgan’s position, he may try to push for the same quality of weekly manager’s meetings as Morgan has, but they will not have the same effect on cohesion—at least not for a while. Sam does not yet have the confidence to work at the relationships that Morgan has. Figure 12, which presented the Hierarchy versus leadership map including distance and need within the hierarchy, will certainly change and Mitch may not automatically move into Jenny’s spot. While the survey describes only a snapshot, Mitch scored lower on all self scores than Sam did and still scored himself much higher than his team did. Although Sam’s self scores were higher than Mitch’s, his team still scored him even higher.

A longitudinal study in such organizations would also bolster the understanding of how need and social distance can be recognized and manipulated to affect boundary spanning. Once the TLQ has support from data to identify need and distance as individual constructs, another facet of this study should include a survey, training intervention, and post intervention survey to identify the effectiveness of the targeted training intervention. This would be appropriate for longitudinal group comparison and more immediately for organizational leadership training curriculum.
Interviewing all team members and superiors before interviewing any of the external leaders would allow the researcher to develop an understanding of the context of opinions and environment that would inform and may influence interview questions for the external leaders. While it may also be appropriate to conduct follow-up interviews with the leaders and team members, including more participants who are not directly involved in the specific teams may find some anecdotal information that the team members may not be able or willing to share. Out-group perceptions and stories may be very different from in-group stories.

A model of cascading boundary spanning is an interesting idea to pursue. Ryan believes that he pushes open communication and team work down through the ranks. Morgan believes that he pushes the same, but believes that Ryan does not. Jenny does appear to be the hub who has consistently pushed for open communication and team work—and directly affects those who work with her. Jenny turns the model idea from cascading to radiating; research needs to be conducted to identify how teams relate to or are affected by both types. My hunch is that the radiant type is more effective, but has to be identified and utilized as the hubs that they are. I believe that in such an organization as a university, there is generally too much social and power distance between hierarchical levels to make high quality personal connections, which build cohesion. While people could be placed in position as a network or information hub, such as all the managers, the people in these positions need the EI and positive, optimistic attitudes to become social hubs as well. However, if the person at the top of this hill is well aware of the effects of boundary spanning (including the importance of identifying and appropriately reacting to need, and reducing leader distance), carefully selects people based on their “people skills,” and creates the environment conducive to boundary spanning, a cascading model could be effectively implemented.
Because the interview process that makes participants start to think about some of the responses they provided, perhaps some may have been made aware of some things that either were not apparent or that they have not dealt with in a while. I would be interested to follow-up to see if anyone tries to influence their relationship with Ryan to build a better social rapport or, if nothing else, to make him aware that he makes some people feel uncomfortable and they would like it to stop. The fact that he is a very likable person leads me to believe that he does not intend to offend and that negative habits could, without too much work, be replaced with new, good habits.

A policy of requiring a CIO to have a degree shows little respect for the knowledge and experiences Morgan has gained over his 30 years of ITS service. While a person who is judging another for faculty tenure or promotion, for example, should have participated in teaching and research and should have reached tenure to understand what the person going up for tenure is experiencing, this should not be the case in a position of customer service and personal relations. Perhaps people who do not understand computers and networking think it is all about task lists and commodity programming hours. That would, in fact, be wrong; programming requires teamwork and creativity. More than many other departments, ITS projects require coordination from many areas. For example, building a Web application to be used throughout the university would require, at the minimum, a content expert, project manager, programmer, designer, quality assurance, end-user and tech support training, system documentation, communication, tech support, and a budget to do all this. At a university, such a project would be one of at least 50 that are in different stages of development and most of the team members also work on multiple projects with multiple teams. The complexity of IT projects requires leadership, not management. IT projects are interesting in that mistakes are often highly visible and users need
them to work, so special care must be taken to assure a quality product. It must work as scoped, must receive and pass the correct information correctly and consistently and must not throw off any other system in the process. Communicating realistic deadlines, budgets, and capabilities to people (clients) beyond the ITS department requires managing the expectation of and relationship with the client. That expectation cannot be managed without understanding the true capabilities and capacity of the department. Capability includes what can be done that meets quality standard and capacity is how many units of what can be done while still meeting the quality standard. The members of the teams need to trust that whoever represents them beyond the department will do a consistently correct job of it.

**Team Leader Questionnaire**

The TLQ is new and has a bright future. Future studies would require further development of the TLQ that measure different constructs. The single-loading on the factor analysis was not surprising. While a single construct, boundary spanning is a fantastic set of related competencies. Initial confusion over the single placement of coaching under empowering seems limiting to the power of coaching. Coaching could arguably fit as a thread through all four functions. Without relating and building a rapport, the leader would not be looked at as a coach or model. Without scouting to find information, there would be little to model and few real world examples to coach.

Each of the competencies offers great modeling opportunities and modeling is generally accepted in the leadership literature as a function of coaching. Table 1 makes a connection of modeling to each of Druskat and Wheeler’s four boundary spanning functions as leadership growth opportunities for team members. It seems that coaching could be one of a few threads that weave through the boundary spanning model.
Regarding the TLQ and interviews, several items may be helpful to make a better and more complete measure of boundary spanning. The 360-degree consideration is well suited to identify how need affects boundary spanning. For example, on the TLQ, team members could be asked whether the leader recognizes need, whether the leader knows what to do about the need, whether the leader is able to find the appropriate resources, and whether the leader supplies resources at the appropriate time and for the appropriate duration. The effective leader knows how needs are recognized, comfort in fulfilling the need, whether the leader has existing resources or knows where to get resources, and whether the leader has the technical ability to know the appropriate time and duration to give help. Alignment scores would show the gap in perception.

Leader distance was identified in interviews and could be incorporated into a future quantitative measure of boundary spanning. Physical distance was identified by team members by asking how physical distance affects access and comfort with the leader. Social distance or power differential was identified by asking whether one is recognized, how it is manifested, how often it is displayed by the leader, and whether it is used to enforce behavior of the team or to get resources from the greater organization. Perceived level of occurrence of communication between the team members and the leader was identified by asking team members how often they communicate with the leader about things beyond the project, how often they communicate about the project, and whether communication happens enough and with the quality that is needed.

Distance and need should be added to the TLQ as competencies that measure boundary spanning by the leader. Actually, need and distance could be added in a similar way as strength and magnitude are measured for self-efficacy because all the functions of boundary spanning are
very important, but are made more or less important by need and need is addressed more or less easily by distance. Practically, the leader could be trained to recognize, understand, and act on need appropriately for individual team members, for the team, and for the process. Likewise the team members could be trained to ask for help in a way that the leader understands. These needs could be easier to work through for shared understanding if the leader distance is low. Leader distance could include a partly prescribed environment. For example, beyond weekly meetings, the leader could spend time walking around talking to team members trying to understand what is important to the team member personally, professionally, and as part of the development process. When needs tend to occur for the team member, why they occur, what typically happens if needs are not met, how needs get met, and how these needs could be identified earlier and more efficiently and effectively fulfilled. Adding these questions to the existing TLQ may create a better understand of what facilitates and restricts the leader’s ability to support his or her teams. Adding these types of questions to the interview protocol would how these issues are actually dealt with by both the leader and the team members. These are trainable and require shared understanding, a relationship, and negotiation by the team member and leader.

The Seeking Information in the Broader Organization competency only had one item; so it had no internal consistency reliability—one item hardly allows one to put a finger on the aim. This item was added just before the survey was administered and had no previous reliability data. The intent was to create a line of questions that would get at the social networking aspect of boundary spanning. This cluster needs to be bolstered by questions of others outside of the team members so that when asked about reaching beyond the organization to secure resources for the team, the ones being consulted could create the “other” for that section. So the cluster could be called Seeking Information from and Beyond the Broader Organization. Such interview
questions were beyond the scope of the present study because I did not think that the team or superiors would be privy to the personal out-group relationships that the leader has. It may be possible to have the leader complete the full cluster, have the team and superiors complete only the first thirty-two questions and have network resources, identified by leaders, complete only questions that relate to the seeking information. Then, the outside others could be averaged with the superior and team members (inside other) to create a more inclusive “other” that could better identify the level of seeking information of the leader.

Conclusion

Druskat and Wheeler (2003) found that boundary spanning by external leaders is important to the success of teams. This study has identified personal and organizational characteristics that facilitate and restrict boundary spanning and has identified the influence of need and distance. As EI increases, so does the ability to utilize distance and need to increase BS.

\[
\text{EI} \rightarrow \text{Distance} \rightarrow \text{Need} \rightarrow \text{BS}
\]

There is a multitude of research possibilities that should be conducted to better understand boundary spanning and its impact on performance of team members, team leaders, and the organizations that support them. Boundary spanning is important on both individual and organizational levels. Organizations must learn to set the environment to facilitate boundary spanning as a valued part of the culture. Individuals must increase their own level of boundary spanning awareness and practice so that as a superior, an external leader, or as a team member they can reduce leader distance, understand need, and negotiate the most effective individual and team relationships for high performance.
REFERENCES


Weems-Landingham, V. (2004). *The role of project manager and team member knowledge, skills and abilities (KSAs) in distinguishing virtual project team performance outcomes.* Unpublished Doctoral Dissertation, Case Western Reserve University, Cleveland, OH.


APPENDIX A

Visual Design of the Study
What facilitates boundary spanning success of external leaders? What creates individual and organizational barriers to boundary spanning of external leaders? What are the personal and environmental characteristics that can be improved to facilitate external leaders’ boundary spanning?

Is there a strong positive relationship between Boundary Spanning and Emotional Intelligence?

Ask all external leaders to complete the TLQ and ECI and distribute to three others to complete 360.

Create bivariate regression model predicting TLQ score from ECI score.

Identify ELs whose BS scores are different, but with similar EI scores. Inference done after data are collected.

Case Study design. Select 3 leaders who score different BS with similar EI score.

Identify personal and organizational characteristics that facilitate and restrict boundary spanning.

Themes included:
Need
Leader Distance

Meta-inference will combine QUAN results (relationship between EI and BS discussion) with QUAL case study results to discuss how EI and BS can help EL performance.
APPENDIX B

Team Leader Questionnaire (SELF)
Team Leader Survey

Instructions

The following statements reflect work-related behaviors and relationships. Think about the interactions you’ve had with your co-workers over the last several months and use the scale below to indicate how frequently you’ve shown each behavior listed below.

It should take you less than 30 minutes to complete this questionnaire. Each item in the questionnaire describes a work-related behavior. Think about how you’ve behaved over the previous several months. Then, indicate how frequently you have exhibited each behavior.

Click in the circle that best indicates how frequently you exhibited this behavior. For example, if you never carefully listen to others when they are speaking then click in “Never.” If you infrequently listen carefully to others, then click in, “Rarely.” If you listen carefully to others about half of the time, then click in “Sometimes.” If you listen carefully most of the time, then click in “Often” and if you listen carefully very frequently (i.e., all the time or nearly all the time) and consistently, then click in, “Consistently.”

Please try to respond to all of the items. If for some reason an item does not apply to this individual or you have not had an opportunity to observe any particular behavior then choose, “Don’t know.”

Thank you for your participation.
The following statements describe behavior or knowledge. Using the seven-point scale on the right, select the number that represents how frequently you exhibit the behavior or demonstrates the knowledge described in the question. Move your cursor to the number click the circle to select it.

**Given the opportunity, how frequently do you exhibit this behavior or demonstrate this knowledge?**

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1. Understand company politics.  
2. Defend your teams’ decisions.  
3. Listen attentively to what team members say.  
4. Assume the role of guide rather than leader in team meetings.  
5. Treat all members of your team fairly.  
6. Present your positions to the team in a persuasive manner.  
7. Understand how upper level decisions get made.  
8. Protect your team(s) from outside interference.  
9. Convey information to team members about the company’s goals and direction.  
10. Let the team know when it is doing a good job.  
11. Knows how to get things done in this company.  
12. Enforce company rules, policies, and procedures.  
13. Remain open-minded about team decisions.  
14. Talk openly and directly with your team(s) about concerns with their performance or work.  
15. Help team members with their work problems.
Given the opportunity, how frequently do you exhibit this behavior or demonstrate this knowledge?

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Given the opportunity, how frequently do you exhibit this behavior or demonstrate this knowledge?

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16. View yourself as a member of the team.

17. Solve problems by seeking information from many different sources.

18. Respond quickly to team requests.

19. Understand and follow company policies.

20. Empower your team(s) to manage themselves.

21. Show team members you care about them.

22. Focus team meetings by asking questions and making suggestions.

23. Develop individual team member skills through one-on-one coaching.

24. Develop individual team member skills through one-on-one coaching.

25. Convey information to your team(s) about how their work helps the company achieve its goals.

26. Delegate responsibility and decision-making authority to the team.
Given the opportunity, how **frequently** do you exhibit this behavior or demonstrate this knowledge?

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27. Let the team influence your thinking. 
28. Share information with the team about important things going on in the company. 
29. Encourage team members to facilitate their own team meetings. 
30. Think about the whole organizational system when solving problems. 
31. Provide your team(s) with feedback. 
32. Step in when needed and work with the team. 
33. Assign or suggest work experiences and training sessions to develop team member skills. 
34. Seek the input and advice of senior level managers 
35. Seek the input and advice of peers. 
36. Seek technical information from individuals outside of the team. 
37. Approach your manager for advice in solving a problem 
38. Seek input and advice from administrative personnel.
Background Information about You

1. Gender: Male____ Female____

2. Age:
   ____ under 25  
   ____ 25-35  
   ____ 36-45  
   ____ 46-55  
   ____ 56 and over

3. Education (check highest category):
   ____ Grade school  
   ____ Some high school  
   ____ High school degree  
   ____ Some college or technical school  
   ____ Technical school degree  
   ____ College degree  
   ____ Graduate work or Graduate degree

4. How long have you worked at Step2? __________________

5. How long have you been a member on your current team? _____________
APPENDIX C
Team Leader Questionnaire (OTHER)
Team Leader Survey

Instructions

The following statements reflect work-related behaviors and relationships. Think about the interactions you’ve had with your team leader over the last several months and use the scale below to indicate how frequently he or she has shown each behavior listed below.

It should take you less than 30 minutes to complete this questionnaire. Each item in the questionnaire describes a work-related behavior.

Click in the circle that best indicates how frequently your team leader exhibited this behavior. For example, if he or she never carefully listens to others when they are speaking then click in “Never.” If he or she infrequently listens carefully to others, then click in, “Rarely.” If he or she listens carefully to others about half of the time, then click in “Sometimes.” If he or she listens carefully most of the time, then click in “Often” and if he or she listens carefully very frequently (i.e., all the time or nearly all the time) and consistently, then click in, “Consistently.”

Please try to respond to all of the items. If for some reason an item does not apply to this individual or you have not had an opportunity to observe any particular behavior then choose, “Don’t know.”

Thank you for your participation.
How frequently does your team leader display this behavior or knowledge, when opportunities arise?

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<td>1.</td>
<td>Understands company politics.</td>
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<td>2.</td>
<td>Defends the team’s decisions.</td>
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<td>3.</td>
<td>Listens attentively to what team members say.</td>
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<td>4.</td>
<td>Assumes the role of guide rather than leader in team meetings.</td>
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<td>5.</td>
<td>Treats all members of the team fairly.</td>
<td>1 2 3 4 5 6 7</td>
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<td>6.</td>
<td>Presents ideas and positions to the team in a persuasive manner.</td>
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<td>7.</td>
<td>Understands how upper level decisions get made.</td>
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<td>8.</td>
<td>Protects his or her team from outside interference.</td>
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<td>9.</td>
<td>Conveys information to team members about the company’s goals and direction.</td>
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<td>10.</td>
<td>Lets the team know when it is doing a good job.</td>
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<td>11.</td>
<td>Knows how to get things done in our company.</td>
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<td>12.</td>
<td>Enforces company rules, policies, and procedures.</td>
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<td>13.</td>
<td>Is open-minded about team decisions.</td>
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<td>14.</td>
<td>Talks with the team openly and directly about any concerns with its performance or work.</td>
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<td>15.</td>
<td>Helps team members with their work problems.</td>
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<td>Views self to be a member of the team</td>
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<td>17</td>
<td>Solves problems by seeking information from many different sources.</td>
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<td>18</td>
<td>Responds quickly to team requests.</td>
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<td>19</td>
<td>Understands and adheres to company policies.</td>
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<td>20</td>
<td>Empowers the team to manage itself.</td>
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<td>21</td>
<td>Shows team members he or she cares about them.</td>
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<td>22</td>
<td>Focuses team meetings by asking questions and making suggestions</td>
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<td>23</td>
<td>Develops individual team member skills through one-on-one coaching sessions.</td>
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<td>24</td>
<td>Conveys information to the team about how its work fits into the company’s goals.</td>
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<td>25</td>
<td>Delegates responsibility and decision-making authority to the team.</td>
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<td>26</td>
<td>Lets the team influence his or her thinking.</td>
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<tr>
<td>27</td>
<td>Shares information with the team about important things going on in the company.</td>
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<td>28</td>
<td>Encourages team members to facilitate their own team meetings.</td>
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<td>29</td>
<td>Solves problems by examining how the problem fits into the larger company context.</td>
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<td>30</td>
<td>Provides the team with feedback.</td>
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<td>31</td>
<td>Steps in when needed and works with the team.</td>
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<td>32</td>
<td>Assigns or suggests work experiences and training sessions to develop team member skills.</td>
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<tr>
<td>33</td>
<td>Assigns or suggests work experiences and training sessions to develop team member skills.</td>
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APPENDIX D

Informed Consent (OTHER)
Informed Consent – Team Member

Principal Investigator: Frank Latendresse    Phone: 419-304-3861

Project Title: Facilitators and Restrictors of Boundary Spanning

You have been invited with no obligation to participate in a study designed to investigate support for teams from the team member’s perspective. Specifically, I am a graduate student at BGSU doing research for my dissertation and am interested in detailing how a leader supports teams and how personal and organizational characteristics help and hinder the leader’s support of the team.

You are under no obligation to complete the study; participation is strictly voluntary. Participation or non-participation will not affect your job in any way. There are no anticipated risks involved with participation in this study.

If you choose to participate, there will be one on-line questionnaire evaluating your perception of Sam which should take no longer than 30 minutes to complete. This survey will be located at http://www.surveymonkey.com/s.asp?u=717571453057 and if you choose to participate, your specific password is elo10. If confidentiality is a concern for you, you may wish to complete the survey at home or at a public library. If you prefer to complete a paper version, you may fax it to the same number below that you fax this document. You may also be requested to participate in a half-hour interview to further explore your perception of the external leader of your team. Dawn will only receive aggregate scores from all team members and superiors.

The information obtained from this study will be kept confidential and will only be reported in statistical and/or qualitative analysis with no specific connections made to you. The external leader you are describing will have no idea who is participating in the evaluation.

Your decision whether to participate or not will not interfere with your future relations with Bowling Green State University, the College of Education and Human Development, the Educational Administration and Leadership Studies division, or the investigator; additionally, the investigator may choose to cancel your participation at any time. Furthermore, you are free to withdraw from the experiment at any time without prejudice.

Do you have any questions (please circle one)?         Yes                 No

If yes, please contact the investigator at the above phone number, by email at: flatend@bgnet.bgsu.edu, or in writing on the back of this form. You may also contact my co-advisors, Dr. Patrick Pauken at 419-372-2550 (paukenp@bgnet.bgsu.edu) or Dr. Mark Earley at 419-372-0247 or earleym@bgnet.bgsu.edu).

You may also contact the Chair, Human Subjects Review Board, Bowling Green State University: 419-372-7716 or at hsrb@bgnet.bgsu.edu, if questions or problems concerning your participation or your rights as a participant arise during the course of the study. Do not sign this sheet until these questions have been addressed to your satisfaction. Please retain a copy of this form (two have been provided) for your records.

APPROVED – BGSU HSRB
EFFECTIVE 8/24/05
EXPIRES 7/17/06
If you decide to participate, please signify that you agree below and fax back to me at 419-372-8448. After you return this, please go to the Web address above and use your assigned password to complete the questionnaire.

YOU ARE MAKING A DECISION WHETHER OR NOT TO PARTICIPATE IN THIS STUDY HAVING READ THE INFORMATION PROVIDED ABOVE, AND BASED ON THE FACT THAT ALL OF YOUR QUESTIONS HAVE BEEN ADDRESSED TO YOUR SATISFACTION. FURTHER, YOU HAVE BEEN INFORMED AND ACCEPT THAT YOUR RESPONSES WILL BE RECORDED FOR ANALYSIS IN THIS STUDY.

Project Title: Facilitators and Restrictors of Boundary Spanning

I AGREE DO NOT AGREE to participate in this study.
(Please circle one)

Date: ___________ Participant’s signature: ______________________________

Participant’s name (print): ______________________________

Thank you for your time and consideration.

Sincerely,

Frank Latendresse
Doctoral Candidate and Graduate Assistant
Educational Administration and Leadership Studies
Bowling Green State University

Patrick Pauken, J.D., Ph.D.
Associate Professor and Interim Chair
Educational Administration and Leadership Studies
Bowling Green State University

Mark Earley, Ph.D.
Assistant Professor
Educational Foundations and Inquiry
Bowling Green State University
APPENDIX E

External Leader Interview Questions
External Leader Interview Questions

Briefly, what is the best and worst thing about that position?

Relating
What do you do to build relationships with your team members?
What do you do to build relationships with your superiors?

What do you do to communicate what is happening in the organization to your team?
What do you do to build team trust in you? In the organization?

Scouting
What do you do to seek information from superiors and peers?
What makes it hard to get information from your superiors and peers?

What do you do to investigate problems within your teams?
What makes it hard to investigate problems within your teams?

Persuading
What do you do to get external support (time, money, expertise) for your teams?
What makes it hard to get external support for your teams?

What do you do to communicate corporate politics and its effects on your teams – both to the teams and to superiors?

Empowering
What do you do to delegate authority to your teams?
What makes it hard to develop and empower your team members?

How are you coached? By whom?
APPENDIX F

Superior Interview Questions
Superior Interview Questions

Briefly, what is the best and worst thing about that position?

Relating
What does she/he do to build relationships with her/his team members?
What does she/he do to build relationships with you?

What does she/he do to communicate what is happening in the organization to her/his team?
What does she/he do to build team trust in her/him? In the organization?

Scouting
What does she/he do to seek information from you and her/his peers?
What makes it hard to get information from you and peers?

What does she/he do to investigate problems within her/his teams?
What makes it hard to investigate problems within her/his teams?

Persuading
What does she/he do to get external support (time, money, expertise) for her/his teams?
What makes it hard to get external support for her/his teams?

What does she/he do communicate corporate politics and its effects on her/his teams – both to the teams and to you?

Empowering
What does she/he do to delegate authority to her/his teams?
What makes it hard to develop and empower her/his team members?

What makes it easy for her/him to develop and empower her/his team members?
APPENDIX G

Team Member Interview Questions
Team Member Interview Questions

Briefly, what is the best and worst thing about that position?

Relating
What does your leader do to build relationships with you as a team member?
What does she/he do to communicate what is happening in the organization to your team?
What does she/he do to build team trust in her/him? In the organization?

Scouting
What does she/he do to seek information from her/his superiors, peers, and technical specialists?
What makes it hard to get information from these people?
What does she/he do to investigate problems within her/his teams?
What makes it hard to investigate problems within her/his teams?

Persuading
What does she/he do to get external support (time, money, expertise) for your team?
What makes it hard to get external support for your teams?
What does she/he do communicate corporate politics and its effects on your team?

Empowering
What does she/he do to delegate authority to your team?
What makes it hard to develop and empower your team members?
What makes it easy for her/him to develop and empower her/his team members?
APPENDIX H

Factor Analysis
Factor analysis was used to determine the construct validity of the TLQ. Construct validity is used to ensure that the items are discriminately measuring factors. Sample size was very small and therefore poor. Item 9, convey information to team members about the organization's goals and direction, was the lowest score of the first factor. A scree plot shows an Eigenvalue of 14.6 at the first component and drops to 2.03 with a significant knee. According to Mertler and Vannatta (2005), the component before the knee bend should be used as the loading factor. Practically, whether the factor analysis shows a one-factor or three-factor loading makes little difference in this particular case because the TLQ is still in development and the small sample showing one-factor loading does not mean that the individual BS competencies do not exist, but that further research is needed.

Only five items failed to load well on factor 1 (shaded in the table below). Question 9 (Convey information to team members about the company's goals and direction) is in the Persuading the team cluster, question 127 (Enforce company rules, policies, and procedures) is in the Political Awareness cluster, question 25 (Delegate responsibility and decision-making authority to the team) is in the Empowering the Team cluster, and questions 30 (Provide the team with feedback) and 32 (Assign or suggest work experiences and training sessions to develop team member skills) are in the coaching cluster.

<table>
<thead>
<tr>
<th>Factor Analysis scores</th>
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<tbody>
<tr>
<td>Component</td>
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<tr>
<td>1  2  3  4  5  6</td>
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<td>VAR00001 .773 -.282 -0.099 -.272 -.163 .165</td>
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<td>VAR00002 .810 -.104 -.142 -.130 .054 .200</td>
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<td>VAR00003 .804 .124 -.052 .048 -.189 -.087</td>
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<td>VAR00004 .713 -.320 -.233 -.155 .013 .039</td>
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<td>VAR00005 .742 .170 -.125 -.249 .327 .178</td>
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*Note: Extraction Method: Principal Component Analysis. Six components extracted.*