

An Investigation of Exemplary Acts of Followership: A Multiple Case Study Design

A DISSERTATION

SUBMITTED TO THE FACULTY OF THE SCHOOL OF EDUCATION OF THE

UNIVERSITY OF ST. THOMAS

By

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IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE DEGREE OF

DOCTOR OF EDUCATION

December 2009

UNIVERSITY OF ST. THOMAS

We certify that we have read this dissertation and approved it as adequate in scope and quality for the degree of Doctor of Education and hereby approve the dissertation.

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A handwritten signature in black ink that reads "Nick Nissley". The signature is written in a cursive style with a large, stylized "N" and "i".

Nick Nissley, Ed.D., Committee Member

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Dedication

The long journey of completing my doctoral degree began more than five years ago. During that time I made new friends, traveled to places that I had never imagined visiting, and learned about my own level of personal capacity. Throughout the process, I also found that for every book or article I read, each led me to others that caught my interest and took me in new directions.

As I consider the completion of my dissertation, I recognize that I would have been unable to accomplish this personal milestone without the help and support of my family and friends. And, I was constantly amazed about the help that I received from strangers along the way.

Completing my doctorate degree would not have been possible without the love and support of my wife, Nancy. I enjoyed our long discussions over a glass of wine as we talked about potential topics for my dissertation, appreciated your inspiration throughout the entire process as well as your encouragement and constructive criticism. Most of all, thank you for putting up my discussions of ontology and epistemology!

Also, thanks to my children, Jamie, Leah, and Chris for their love and their interest in what Dad was doing.

In addition, my work was guided by the late Dr. Sharon Gibson who served as my initial chair. Sharon helped shape my work, provided me with timely feedback, and asked great questions. I will miss our friendship.

Since starting work on my doctoral degree, I received outstanding support from the Organization Development faculty at the University of St. Thomas. I will always be

grateful to Dr. John Conbere who got me started in this program, but more importantly helped me finish as he took over as the chair of my committee when I knew he had other important work. John always helped put things into perspective and offered encouragement while guiding me along the way. Thanks also to Dr. Alla Heorhiadi for serving on my committee, but also for taking me in new directions with consulting opportunities in Kiev, Ukraine. Finally, I am grateful for the help of Dr. Nick Nissely for not only serving on my committee, but also for checking on my progress from time-to-time, offering ideas, and sending articles related to my dissertation.

I appreciate the time and energy of all of my research subjects and their peer/leaders. I truly enjoyed meeting each of them, learning about their stories, and for their help in allowing me to complete one of my dreams!

Finally, best wishes to my fellow members of Cohort 3 at UST! They, along with all my other friends and family, provided me with support by checking from time to time and exchanging insights throughout the long process.

Abstract

In this study I investigated various exemplary acts of followership in response to a general call for research in the growing field of followership. While it was acknowledged that leaders play an important role in the short- and long-term health of an organization, followers appeared to be key partners in organization development as well. However, even though the concepts of leader and follower are symbiotic in nature (i.e. one cannot exist without the other), there was a significant gap of inquiry regarding followers. For the most part, followership had been largely ignored as a field of study. In this study I sought to better understand the motivations of followers who had engaged in an exemplary act of followership.

This study differentiated itself from the available literature on the topic by building from an interpretivist epistemological viewpoint. In particular, this investigation was predicated upon a multiple case study methodology intent on exploring five incidents of exemplary followership from distinct professional fields. The outcomes of the inquiry provided insights into the importance of the organization, the leader, and the personal motivations of followers.

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Chapter 1

Introduction

Organizations are entities that develop or are formed to achieve a common mission. In pursuing its specific purpose, an organization can take on any number of forms ranging in scope and size. For example, organizations might be defined as a loose confederation of individuals united to find a solution to a short-term issue, a non-profit group seeking to advance a common cause, or a highly structured and complex Fortune 500 company in search of new business opportunities. Regardless of the size or structure of the organization, the success of such associations is often attributed to the relative effectiveness of its leadership. The leader of an organization has responsibility for many different functions including, among other things, charting the direction of the entity, developing appropriate strategies, managing change, and influencing others to achieve a common goal (Northouse, 2004). And, while leadership is no doubt critically important to achieving organizational success, the ultimate deciding factor in determining whether those goals and objectives are accomplished may be more dependent upon the followers within the group. According to Kelley (1992), leaders contributed on average no more than 20 percent to the success of organizations, while followers contributed the remaining 80 percent.

Intuitively, it would generally be recognized that the typical organization has more followers than leaders. Moreover, upon close examination, even the leaders within any group may also function as followers in some capacity. Yet, the term “follower” typically elicits a negative connotation (Chaleff, 2003). Often referred to in disparaging terms such as “sheep,” “yes” people, or the “enigmatic majority” (Dixon & Westbrook,

2003; Riggio, Chaleff, & Lipman-Blumen, 2008), followers have been largely underappreciated and ignored in comparison to more extensive investigations of leaders.

Based upon even a cursory search of the Internet and available literature, it appears that the leadership industry is all-pervasive. Countless books, articles, and programs are dedicated to the discussion of leadership theory, leadership development, and the tips and secrets of important role models. Such books reach back 2,000 years seeking leadership insights from ancient master warriors, such as Sun Tzu (Cleary, 1988), and continue into the present day seeking to learn from current anointed extraordinary leaders such as Jack Welch (Welch & Byrne, 2001). Only recently has the importance of followers become a topic of investigation. The acknowledgment of followership and the study of its relative importance began in earnest only in the last 20 years. And, even now, such academic reviews of followers and followership have produced only a minimal number of empirical studies. The vast majority of the literature written about the tenets of followers and followership appears to be more observational or theoretical in nature.

While a comprehensive review of the existing literature regarding followership will be outlined below, several points become immediately evident regarding this topic. First, it is clear that leadership and followership are inextricably connected (Collinson, 2006; Heller & Van Til, 1983). Leaders cannot exist without followers (Hollander, 1992, 1995). In addition, leaders and followers are interdependent and symbiotic in nature (Goethals & Sorensen, 2004; Reicher, Haslam, & Hopkins, 2005). The actions of one impact and moderate the behavior of the other (Hollander, 1992). Moreover, the relationship between leaders and followers and the organization is both dynamic and complex.

Given the apparent complexities of these relationships, it is appropriate to investigate the impact of followers in this mix. However, this dynamic has rarely been examined from the perspective of the follower. This study is an attempt to add to the collective body of knowledge regarding followership.

Significance of the Study

The present day organization is under increasing pressure to meet the demands of its various stakeholders. For instance, stockholders of publicly traded entities expect that the companies they invest in will meet their short-term quarterly targets ensuring adequate returns. Boards of directors of such entities seek to ensure the long-term viability of their organizations through appropriate strategies for growth, while also having oversight responsibility for expense management. The individual leaders of such businesses attempt to manage change steering their organizations through a maze of issues in an attempt to stay out in front of competitors, to develop new products and services, and to optimize operations. Traditionally, that leader has been charged with enormous responsibilities in a more complex environment. Compounding the issue is the expectation that such leaders do more with less so that organizations operate in as lean a manner as possible (Bennis, 1999; Dixon & Westbrook, 2003). As such, the pressures of the organization cascade down to the leader.

In the past, the traditional model of leadership pointed to the “great man” theory (Stogdill, 1974), which put forth the idea that leaders possessed traits and qualities as a “divine gift of birth... granted to a small number of people” (Kotter, 1996, p. 176). Such a theory gives rise to the image of a heroic leader as an all-knowing charismatic

individual who can continually save the day for the organization (Badaracco, 2001).

However, research on leadership success supports that a trait-based approach to leadership rarely determines an individual's success (Bennis & Thomas, 2002).

Further, there is little evidence that indicates that top down management change efforts are successful (Olson & Eoyang, 2001). Given the more sophisticated environment, top management alone cannot accomplish organizational goals no matter how gifted the leadership is considering the myriad of problems to be identified and solved (Bennis, 1999).

A new breed of leader recognizes that they are not a "sole voyager" (Hollander, 1995, p. 55) in pursuing the mission of the organization. Ultimately, such leaders recognize that the followers in the organization are partners in pursuit of a purpose (Chaleff, 2003) and that the concept of leadership is a "shared experience" (Hollander, p. 55) with benefits to be gained and hazards to be addressed by the parties involved. In addition, such theory suggests that the accomplishments of leaders are at best indirect and their success is achieved by operating through the actions of others (Lord & Brown, 2004). Further, this conception recognizes that leadership effectiveness depends largely upon the ability to establish loyal, capable, and knowledgeable followers (Lundin & Lancaster, 1990). Ultimately, it has been surmised that both exemplary leadership and organizational change are impossible without the full inclusion and cooperation of followers (Bennis, 1999).

In contrast to leaders, the development of followers, their motivations, and various other aspects of their role appear to be understood to a lesser degree. While not all followers are created equal, the literature suggests that many do not see themselves as

subordinate to the leader. Some followers view themselves as sharing a common purpose and are committed to what an organization intends to accomplish (Chaleff, 2003; Kelley, 1988). In addition, while leaders have power within the organization, followers also retain multiple aspects of power as well (Chaleff). The most effective followers manage themselves well, build their competence, and can be described as honest, courageous, and credible (Kelley). In fact, those effective followers see themselves as equals to the leader differentiated by only the role they play (Heller & Van Til, 1983; Kelley). However, the open issue in the entire dynamic is the question, “what compels followers to follow?”

Assuming that effective followers are committed to a purpose outside of themselves, retain power, and exhibit many of the characteristics and qualities valued in leaders, they would appear to be valued partners in achieving organizational goals. Conversely, followers would also possess the ability to stymie a leader and an organization through a negative use of power or in pursuing a purpose in their own self-interest. If followership is an integral part of change management and organizational effectiveness, it would be logical that understanding followers, their motives and drives, and their true impact would be indicated. Moreover, an inquiry into the interplay between followers, their leaders, and their organizations is worthy of empirical investigation as there appears to be a significant gap in the research on this important topical area. In many respects, the motivations of followers remain relatively unexplored when compared to those of the leader.

While it is clear that followers can have a great impact in their traditional roles, from time-to-time they also perform extraordinary acts that seem to go above and beyond expectations. For example, a firefighter runs into a burning building to save the life of

another human being. In this situation, does the leader influence a follower to the extent that they are willing to risk their life in carrying out a task? Is the mission of the organization so compelling as to motivate the follower to take on such an assignment? Or, is the follower motivated by other undeterminable internal forces in carrying out this activity? Clearly, such exceptional acts performed by followers are both undeniable and intriguing. The intent of this research study is to examine various exemplary acts of followers in an attempt to better understand their motivations and the role of leaders and organizations in contributing to the followers' engagement in the exemplary act.

Researcher Interest

In considering my personal and professional experiences as a leader, a follower, and a member of various organizations, I have observed followership taking place in many forms. While the vast majority of followers' work meets reasonable expectations and they are onboard regarding the mission of the organization, I am intrigued about the varying degrees of commitment by others. Some followers seem to merely go through the motions in their daily activities. At the same time, others who work next to these underperforming individuals go well beyond their assignments. Additionally, from time-to-time, you read or hear about followers who perform well beyond the expectations of any organization even to the extent of placing themselves at personal risk.

From a personal standpoint, my fascination is in understanding the motivations and inspirations of people who perform these exemplary acts of followership. Considering the lack of work regarding followership, I hope to learn more about what

inspires such acts, so as to assist both the development of individual followers and the organizations for which they are employed.

Purpose of the Study

The purpose of this study is: 1) to examine the motivations and inspirations of followers who have engaged in an exemplary act of followership, and 2) to gain an understanding of how leaders and organizations contribute to followers' engagement in an exemplary act.

This study will use a multiple case study design to examine aspects that motivate followers to perform an exemplary act. It is hoped that such an inquiry might provide greater insights into understanding the factors that inspire followers to follow on a day-to-day basis. In doing so, this study might provide insights in building a better partnership with leaders and improve the overall effectiveness of organizations.

Chapter 2

Review of Literature

The study of followers and followership is best characterized as an emerging topic. Despite the prevalence and importance of followers in a general sense, the amount and scope of literature regarding the subject pales in comparison to research and work focused on understanding leaders and building leadership capabilities. A general search for the topic of followership provided a number of short opinion articles acknowledging the importance of the role of followers packaged in anecdotal stories or laundry lists of supposed key behaviors. However, upon a deeper investigation, there was a layer of definitive and important core foundational work regarding followership that has developed over the past 20 years. In addition, there was work that included studies and theories addressing followers from an external viewpoint, i.e. within the discussion of leadership or from an organizational perspective. For the most part, such work was focused on engaging or inspiring subordinates to follow the leader within the framework of social psychology. Moreover, there were various references to followership in exploring related subjects relevant to organization development.

In this review, I will begin by discussing the evolution of the concept of followership. Next, aspects of group formation will be reviewed to include several possible explanations of group theory outlining the social process of how hierarchies evolve as well as how leader and follower roles develop. Specifically, I will reference multiple possible anthropological explanations for group theory. Following that discussion, the review will then shift into examining aspects of applicable motivation

theory as a precursor to an examination of the foundations of “pure” followership theory and research. In particular, this investigation will outline the brief history of the inquiry into followership, an introduction to the thought-leaders in the field, and an understanding of the current thinking on this topic. Given the relative infancy of followership literature, the vast majority of work regarding this branch of learning is theoretical in nature as relatively few empirical studies are on point. Finally, considering the interdependent nature of followers’ vis-à-vis leaders, an overview of the essential precepts of leadership theory will be presented to set the stage for a discussion of the interplay between followers and leaders and the creation of positive organizational environments. Also within this review, various other related areas of study will be referenced in an effort to begin to understand the nature of followers within the organization.

Concepts of Followership

The current concept of the follower was generally seen in a less than flattering manner. Often pejoratively labeled, followers have been cast as conformists or seen as underachievers who have chosen not to excel, as one might be expected to do if they had been in a leadership role. However, in reviewing the historical context of this concept, one comes to see followers in a different light. The etymological root of the word “follower” was set in Old High German as “follaziohan” meaning “to assist, help, succor, or minister to” (Kelley, 1992, p. 34). This definition corresponds to the Old High German root of the term “leader” which meant “to undergo, suffer, or endure” (Kelley, p. 34). Further, as Kelley pointed out, “in the original meaning, followers helped take care of

leaders” (1992, p. 34). Thus, the relationship between leaders and followers was symbiotic in nature and one of equals (Goethals & Sorensen, 2004; Kelley). In time, the term “follower” evolved to mean “to go or to be full in number” (Kelley, p. 34). Therefore, to be accorded the status of follower was considered an honor associated with a level of prestige, such as when King Arthur chose the knights of the roundtable (Kelley).

The Development of Leader and Follower Roles

Over time, various thoughts and management theories were introduced that are seen as shaping followership, as we now perceive the concept. While the “great man” theory (Stogdill, 1974) may be a source for the existing definition of “leaders,” the current less than flattering connotation of the word “follower” would appear to arise from several schools of thought. One particular example was the concept of “social Darwinism” and the precept of “survival of the fittest” (Kelley, 1992). Essentially, in a general struggle for power within our current culture, those who were hailed as winners came to be seen as leaders, while everyone else was considered to be a loser and were thus labeled a follower (Kelley). A second possible source that would seem to reaffirm the current connotation of followers arose from evolving management theory. In the not too distant past, McGregor’s Theory X was seen as a viable management philosophy. This theory proposed that leaders assumed that people, presumably followers, preferred to avoid responsibility, had little ambition, and needed to be prodded to do their work (Rothwell, Sullivan, & McLean, 1995). Such a thought process assumed that leaders

literally needed to coerce their employees to work and appeared to reinforce the myth of the unmotivated follower.

From an anthropological perspective, the dialectic of leadership and followership had existed since the origins of humans. According to Van Vugt (2006), anthropological evidence suggested that there are no human societies without some form of leadership. Moreover, social psychological research indicated that a leader-follower structure emerged spontaneously in groups (Van Vugt). Further, experts have concluded that leadership is a universal human behavior given that a leader-follower relationship naturally developed whenever a group of people comes together (Hollander, 1985). Clearly, leadership has its privileges, as research has reported correlations between leaders and wealth, health, lifespan, and other indices of socioeconomic status (Van Vugt). The more puzzling question was that if given a choice, why people accept the role of the follower?

Several broad perspectives have been advanced to explain the origins of leadership that also address this question. The byproduct dominance theory asserted that leadership and followership do not necessarily exist in the behaviors linked to these roles but are, instead, byproducts of adaptation for dominance and submission (Van Vugt, 2006). According to this school of thought, the role of leaders and followers was explained by their relative position in the hierarchy of the group. Given that some individuals were better at gaining access to scarce resources, they emerged at the top of the hierarchy (Van Vugt). While offering a valid argument for the formation of group structure, this personal dominance type of leader appeared to be counter to prevailing thought regarding leadership in general, especially when conceived as a process means of

influencing others. A second evolutionary theory introduced leadership for the purpose of solving coordination problems (Van Vugt). This concept noted that leadership and followership were social strategies selected for their success in nurturing collective action. In particular, this idea has been tested using game-theoretic models to help explain potential outcomes in a Darwinian approach to natural selection (Van Vugt). Game theory has been used to offer explanations to various anthropological investigations of socialization as compared to test against alternative theories (Runciman, 2005). In examining various potential economic outcomes of evolutionary game theory between leaders and followers, the outcomes suggested that those who take the initiative are more likely to emerge as leaders (Van Vugt). In addition, those individuals who more quickly recognized a situation as a coordination problem, requiring leadership, were more likely to emerge as a leader (Van Vugt). While the game analysis suggested that leaders may benefit more to some degree, it also appeared to indicate that followers saw benefits in following a leader, as long as the rewards received under such an arrangement were greater than those of non-followers (Van Vugt). Thus, the anthropological and associated psychological literature seemed to support leadership and followership as complementary strategies in problem solving (Van Vugt).

Another alternative thought regarding the formation of groups can be found in the social identity theory of leadership (Hogg, 2001; Tajfel, 1972, 1982). Essentially, Tajfel (1972) noted that social identity theorized about how people conceptualize themselves in intergroup contexts and how a system of social categorization helped to define an individual's place in society. Social identity was defined as "the individual's knowledge that he belongs to certain social groups together with some emotional and value

significance to him of this group membership" (Tajfel, 1972, p. 292). Group identification contains two specific components including a cognitive aspect regarding the sense of awareness of membership and an evaluative component regarding a value connotation (Tajfel, 1982). Hogg further noted that if leadership was a structural feature of groups, then leaders and followers were inter-dependent in a social system bounded by a category membership or a common group. Building upon the idea that people more strongly identify with a group, Hogg outlined how individuals engage in a process of social categorization sorting the world into segments of in-groups and out-groups represented by prototypes. These prototypes were context specific, yet remain vague in terms of the attributes that distinguish individuals from one group to another in a depersonalization process (Hogg). In this process, people were not viewed as unique or complex individuals, but only whether they match relevant in-group or out-group prototypes (Hogg). Hogg noted that these social identity processes were motivated by needs for self-enhancement and to reduce subjective uncertainty. When group membership became psychologically salient, individuals conform and were influenced by prototypes of the group (Hogg). Within the group, those individuals who were perceived to be the most prototypical appeared to exert influence over others, ultimately emerged as leaders, and in due course were seen as being effective (Hogg).

There were a number of empirical studies that offered support for various aspects of social identity theory. In particular, a laboratory experiment studying emergent leadership perceptions in groups found that when group membership was salient, people more strongly identified with the group and also believed the prototypical leader to be more effective than a non-prototypical leader (Hains, Hogg, & Duck, 1997). In addition,

a field study of leadership of groups in wilderness experiences showed evidence that group identification, social attraction for the leader, as well as perceived effectiveness increased over time as the group became cohesive (Fielding & Hogg, 1997). Finally, Haslam and Platow (2001) found that support for leaders was enhanced when their decisions affirmed the social identity shared with followers. Moreover, study participants showed lower levels of support for a leader who favored in-group members, who were sympathetic to an out-group position, than for a leader who favored in-group members who opposed an out-group position (Haslam & Platow).

These theories and the related supporting empirical evidence indicated several credible explanations for the development of internal hierarchies among group participants. Given the interdependent nature of leadership and followership, the formation of these roles was implicit in this process. As noted, even though taking on the mantle of leadership has rewards, the intriguing question continues to attempt to understand the motivations to become a follower. At this point, an examination of relevant motivation theory seems indicated.

Relevant Motivation Theory

In considering the interplay of followership in relation to leadership, it becomes evident that followers have varying levels of motivation. At its core, a motive was defined by Merriam-Webster Online (2008) as “something (as a need or desire) that causes a person to act.” Given this starting point regarding those things that cause action, a search of the available literature regarding classic motivational theory yielded a variety of thoughts and ideas on the subject. However, after reviewing this material, it appeared

there was little agreement regarding the nature of motivation, to the extent that Shamir (1991) labeled the entire body of work as being “confusing.” At the same time, it seemed intuitive that variations in the level of followership, as suggested by any number of authors (Chaleff, 2003; Kelley, 1988, 1992) were linked to some degree with differences in motivation. In addition, motivation was an imbedded concept within many definitions of leadership where the premise was that leaders should “motivate” their followers to action (Northouse, 2004; Schein, 2004). Out of this school of thought developed a supposition that leaders retain a certain influence over followers in triggering varying levels of compliance in a complex process. While this treatise was not designed to provide a comprehensive discussion of motivational theory, some understanding of the basic tenets of the concept are appropriate, as well as a review of leadership relationship regarding followers and the issue of compliance.

As previously suggested, the breadth and depth of motivation theory proffered in an attempt to explain the factors that influence followers was immense. For example, Maccoby (2004) differentiated follower motivation, placing it into two categories: rational and irrational. Rational motivation was noted to be conscious behavior where followers seek tangible rewards in the form of money or power (Maccoby). At the opposite end of the spectrum were irrational motivations that are beyond both the awareness and control of the follower, which were based upon Freud’s concept of transference involving a projection of past experiences with an important person onto a leader (Maccoby). Despite the number of thoughts and ideas regarding motivation, the most applicable theories to advance this discussion involve the work of such noted authors as Maslow, McGregor, and Herzberg.

Maslow (1954) suggested that individuals are motivated to achieve a hierarchy of needs, as they work toward achieving their full potential. Within this cosmology, Maslow outlined five categories of motives that were configured from low to high beginning with basic physiological needs, such as food, water, and shelter. Once these fundamental needs have been addressed, higher order needs become important, including, in order of importance, safety, social, ego, and self-actualization (Maslow). According to Maslow, once a lower order need was satisfied, it no longer served as a motivating force. At the highest level, followers seek to achieve a level of self-actualization, meaning that they realize their potential in terms of personal development and expression (Maslow). In many respects, those individuals who reach the highest order level of needs, as defined by Maslow, might also be described as exemplary followers in accordance with the definition offered by Kelley (1988, 1992).

Earlier in this document, the concepts of McGregor's Theory X were outlined vis-à-vis leaders and followers as well as how they might affect the current perceptions of followership (Rothwell, et al., 1995). In addition to Theory X, McGregor also offered an alternative, Theory Y. Theory Y contained primary elements of self-direction and self-control that also remain as compelling primary elements within the discussion of exemplary followership as well.

A final point of classic motivation theory offered within the discussion of followership was Herzberg's (1968) motivation-hygiene theory. According to Herzberg, job satisfaction and motivation "are separate and distinct from the factors that lead to job dissatisfaction" (p. 56). As conceived by Herzberg, satisfaction and dissatisfaction were not considered polar opposites, but as two different needs. One set of these needs were

considered motivating factors that are intrinsic to the work and included elements such as recognition, achievement, growth, and responsibility (Herzberg). The second set of needs involved hygiene factors that caused dissatisfaction and were related to extrinsic aspects of the job, such as working conditions, supervision, company policy, and salary (Herzberg). Empirical data from a study of workers indicated that motivators were the primary cause of job satisfaction, while hygiene factors were noted to be associated with discontent with the job (Herzberg). A broad follow-up study of large organizations measuring factors associated with the motivation of employees who contributed new ideas to their entity appeared to confirm Herzberg's theory (Bassett-Jones & Lloyd, 2005). The findings suggested that money and recognition were not primary sources of motivation in stimulating employees to contribute new ideas (Bassett-Jones & Lloyd). Similar findings regarding motivating factors were reported as being widely replicated in a variety of settings (Herzberg).

Within his discussion of theory, Herzberg (1968) drew a critical distinction between movement and motivation. According to Herzberg, movement was related to positive or negative external inducements to achieve some action while either accomplishing basic needs or in avoiding pain (Bassett-Jones & Lloyd, 2005). In contrast to this short-term movement, Herzberg likened motivation to "an internal self-charging battery" (Bassett-Jones & Lloyd, p. 933) where the drive or energy for accomplishment was intrinsic to the individual. As such, true motivation emanated from an individual's desire for personal growth, achievement, and recognition (Bassett-Jones & Lloyd).

While such classic theories provided a number of profound insights into motivation, they may not necessarily fully explain the stimulus or inspiration of followers

or how leaders incite compliance. Various authors have contributed to the growing base of knowledge regarding motivation theory. For example, Schaffer (2008) offered that motivation was effort and a variable function involving both the situation and the specific individual who had a goal of fulfilling a particular need. In this way of thinking individual performance becomes a function of both ability and effort (Schaffer). Further, Shamir (1991) made the case that most psychological theories of motivation were based on the principle of hedonism and focused on the individual as a “rational maximizer of personal utility” (Shamir, p. 406). Shamir noted that this base of theory works in “strong” situations where there were specific goals and reward-performance expectancies, but may not apply in “weaker” situations where goals were not clear, the means for achieving goals was not well-defined or established, and external rewards were not clearly related to performance or when there was a lack of available rewards. Moreover, Shamir indicated that classic motivation theory did not account for values and moral obligations that explain self sacrifice for the larger concerns of the organization. Within this self-concept theory of motivation, Shamir suggested that individual satisfaction emanated from an expression of attitudes which reflected beliefs or self-image. Such theory was steeped in the idea that people are not only goal-oriented, but also seek self-expression (where the ultimate expression is self-sacrifice); people seek to maintain and enhance self-esteem and self-worth; individuals are motivated to retain and increase their self-consistency; self-concept is a part of identity; and, that self-concept based behaviors are not always connected to clear expectations or immediate and specific objectives (Shamir). This self-concept theory of motivation was proposed to apply to individuals with high levels of self-esteem (Shamir). Moreover, Shamir indicated that such theory

may not be useful in “strong” situations, except to explain non-conforming or deviant behavior.

Motivation was also an essential component within a complex framework that attempted to explain follower compliance to the requests of their leader. Barbuto (2000) theorized that the combination of characteristics of the follower, the leader, and the situation result in a follower’s compliance or non-compliance in accordance with an influence attempt by a leader. Within this framework, leaders use triggers and varying bases of power that combine with the follower’s motivation and level of resistance in determining whether compliance takes place (Barbuto). Such triggers, which are intentional or unintentional inducements on the part of the leader, are instantaneously interpreted by the follower (Barbuto). Influence triggers by the leader include those derived through power, relations, and values; each of which has a number of types (Barbuto). A leader’s base of power in this framework exists if it is perceived by the follower and included levels ranging from reward and coercion to those described as legitimate, referent, or expert. The intervening variables that affect follower compliance included the level of follower resistance to the leader’s trigger, which ranged from behaviors of preference that would have been performed anyway to those that an individual might consider immoral or unethical (Barbuto). Barbuto postulated that those follower responses representing exceptional performance in exceeding job requirements arose from legitimate behaviors that a person would consider reasonable or influence zone behaviors that an individual might consider unreasonable yet might take place as a result of substantial inducements.

Additionally, Barbuto (2000) proposed that follower motivation comes from five sources. Such motivations include: (a) Intrinsic process in which a follower engaged in a behavior due to the work itself providing the incentive. (b) Instrumental rewards incent followers when they see their behaviors as leading to tangible, external outcomes. (c) Self-concept external motivation of followers was identified when followers make an effort to meet the expectations of others by acting in ways that satisfy important group members. (d) Followers exhibiting self-concept internal sources of motivation engaged in behaviors that reinforced their own internal standards. (e) Finally, Barbuto recognized follower goal internalization motivations that stimulate an individual to assume behaviors and attitudes congruent with their own personal values. Such motivation was seen as removing self-interest as the follower believed in the cause and did not require strong inducements. Barbuto also noted that those leaders, who are able to elicit more than one source of motivation in a follower, should be more successful in driving the desired behavior.

All these elements come together in varying combinations and degrees to elicit follower compliance. Barbuto (2000) indicated that the outcome for the specific influence trigger depended upon the level of follower resistance, the individual's specific motivation, and the leader's base of power. Further, Barbuto suggested that empirical research was needed to investigate the specific interactions of the essentials contained within this framework.

The investigation of relevant motivation theory begins to provide some insights into the antecedents of follower action. Such theory leads to a detailed discussion of the foundations of followership.

Foundations of Followership Theory

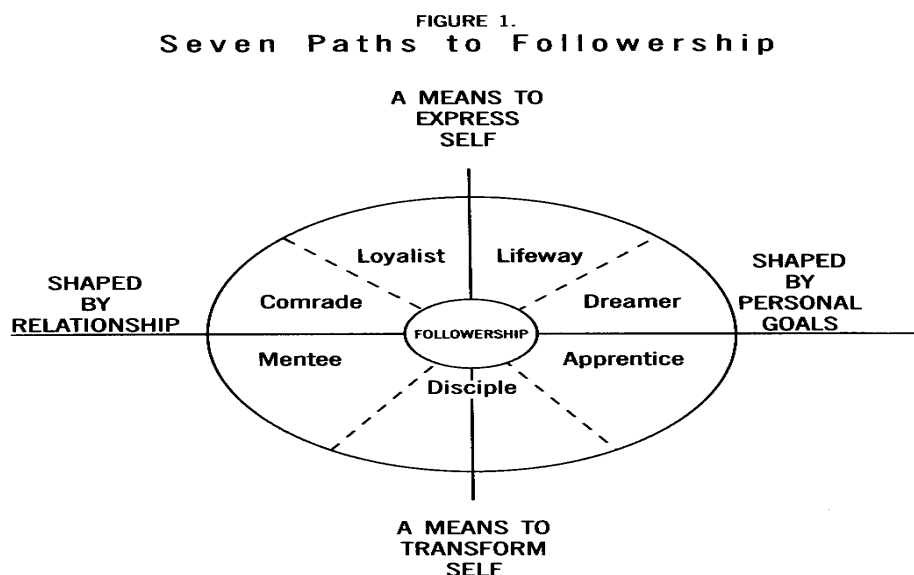
While there are several thought leaders regarding the subject of followership, the origins of study in the field are generally attributed to Robert E. Kelley. His seminal article, “In Praise of Followers,” brought the topic of followership to the forefront of modern management theory. Kelley also offered new insights into the importance of the role to the organization as well as a matrix for understanding effective followership. This initial article was followed by various other publications regarding followership which built a foundation for future work. A second noted expert on followership, Ira Chaleff, has diligently continued to investigate the topic. Chaleff (2003) introduced the notion of the “courageous follower” and additional insights into the role of effective followership within an organization. Moreover, a small and dedicated group of other researchers continues to engage in additional inquiry into followership to explain this interesting role and its importance to leaders and organizations.

While Kelley (1992) acknowledged the significance of the leader and their role in the achievements of an organization, he also concluded that followers are just as important as leaders. Chaleff (2003) supported this idea in proposing a view of the follower’s role that brings it into parity with that of the leader. The importance of the follower appeared to influence both the leader and the organization at large. In particular, Kelley’s quantitative and qualitative research concluded that followers impact leaders to the extent that they ultimately determine not only whether a leader will be accepted, but also whether that leader will be effective in their role. Moreover, those entities that thrive do so based at least in part on how well followers follow (Kelley, 1988). In contemplating this dynamic among leaders, followers, and the organization, Chaleff

proposed that leaders and followers form an action circle both orbiting around that organizational purpose and not centered on the leader. Thus, leaders and followers work in a tenuous relationship while pursuing mutually agreeable organizational outcomes. However, Kelley also distinguished between followers noting that all do not share equal ability. Ultimately, it is those effective followers who were critical to the leader and ultimately for an organization's success (Kelley, 1992).

Kelley (1992) pointed out that organizational success is not a question of whether followers are important, but which type of follower is required to achieve goals. Kelley offered that individual followers retain both various personal motivations and specific styles which are points of differentiation. In particular, Kelley proposed several "paths to followership" where followers are shaped by the means to express versus to transform themselves as well as by those influenced by relationships as opposed to personal goals as illustrated in the figure below.

Figure 1: *Paths to Followership*



Note: From *The Power of Followership* (p. 51), by Robert E. Kelley, 1992, New York: Doubleday. Copyright 1992 by Robert E. Kelley. Reprinted with permission.

In this model, followers are differentiated in part based upon their placement on the axis between the means for expression and the means for transformation. Those individuals who see followership as a path to express themselves are noted to be generally comfortable with key elements of their life, including skill and accomplishments, and are motivated toward the accomplishment of organizational tasks (Kelley, 1992). Conversely, those followers that seek transformation are not satisfied with themselves and are in search of personal growth opportunities. The opposing axis provides for a dichotomy between the personal motivations of relationships and individual objectives. Followers who appreciate interpersonal involvement with others value these bonds more than the goals of the organization. At the opposite end of the axis are those individuals with an intrapersonal focus who see followership as a means of achieving their personal dreams. Kelley indicated that such distinctions are “not absolute or mutually exclusive” (p. 52), but that the specific combinations based on the outcomes in the model form alternative paths toward followership. Moreover, Kelley stated that if leaders understand the specific motivations of the follower, they can create environments that may better attract and retain such individuals.

One path to followership is identified as “the apprentice” (Kelley, 1992, p. 53) who aspires to be a leader, yet understands the need to pay personal dues along the way. These individuals hope to gain the confidence of others in the organization by proving

themselves in the follower role. “Disciples” (Kelley, p. 57) are seen as seeking the transfer of a body of knowledge from a teacher focused primarily on intellectual and not emotional development. While this term is largely connected to a religious connotation, this idea is not confined to theology. Moreover, the psychology of this path to followership is based upon identification where followers desire to both bond with and emulate a leader. “Mentees” (Kelley, p. 62) are distinguished as followers who seek to transform themselves and are in search of personal transformation. Essentially, this type of follower has an intensive one-on-one relationship where a deep attachment forms with an individual, i.e. a mentor, who helps cultivate the follower’s talent. Others seek followership through becoming a part of a community with “comrades” (Kelley, p. 66) in search of social support and intimacy that occurs when people bond together. In such a setting, it is recognized that an endeavor might require the talents and abilities of more than one person, which reinforces feelings of goodwill and a greater likelihood of survival (Kelley, 1988). The “loyalist” (Kelley, p. 71) follows a leader based on a sense of personal loyalty as a result of a potential emotional attachment. These followers are distinguished by a one-to-one relationship with the leader (Kelley, 1992). Another group of followers are committed more to their personal dreams than to an individual leader. “Dreamers” (Kelley, 1992, p. 74) follow leaders not because of who they are, but because they embody a cause or idea. Further, through the psychological process of internalization, a dreamer follows based upon how their individual goals mirror those of the organization. However, once the dream diminishes, these individuals no longer follow and the leader has no power over them.

Kelley distinguished the final path to followership of “lifeway” (1992, p. 51) not as a career choice, but as a way of life to choose to follow as a matter of personal preference. Lifeway followers are recognized as having “the instincts and habits of leaders, but choose the follower role” (Kelley, p. 84). In accepting this path, these followers are seen as natural servants, or a “servant-first” (Greenleaf, 1977, p. 28), who focus on making sure that other people’s highest priority needs are being taken care of. The lifeway follower seeks to contribute, but has rationally decided upon their role. Further, lifeway followers may have limitations that preclude them from accepting a leadership role (Kelley).

In addition to Kelley, other authors have also focused on the motivation of people to follow within the context of various leadership theories. Shamir pointed out that within the “act of faith” (2004, p. 503) of followership, each individual brings various motivations to the relationship with their leader. While leaders can influence a follower’s motivation in various ways, several are beyond the control of the leader (Shamir). The classifications of these various motivations include such concepts as position-based, calculated, safety-based, meaning-based, and identity-based followership (Shamir).

Position-based followership was predicated upon the motivation of people to accept a leader’s influence based on their position within the relevant hierarchy of an organization (Shamir, 2004). Thus, the legitimacy of the group or organization translates to acceptance of the leader and, as a consequence, such followers show a willingness to act on the reasonable requests of the leader within the social system (Shamir). In discussing this followership motivation, Shamir referenced the work of pioneering sociologist Max Weber, who noted that such position-based followership has two bases:

the traditional base and the rational-legal base. The traditional base takes place where individuals have internalized the legitimacy of a tradition and thus accept a leader (Shamir). Those individuals who accept the legitimacy of the organizational hierarchy as rational based on the view that the institutional structure is rational fall into the latter category (Shamir).

A second motivation, calculated followership, reflected the proposition that individuals follow a leader based on expectations that the leader can help them achieve their goals or provide them with rewards (Shamir, 2004). This type of followership was predicated upon an explicit or implicit deal between the leader and the follower. Such an arrangement based on this type of relationship had been labeled as transactional leadership (Burns, 1978). In this concept of the leader-follower relationship, effective leaders remove the barriers to assist followers in achieving their goals, which motivated the individual to follow (Shamir). Also, it should be noted that when the motivation to follow is based entirely on the follower's assessment of what is personally most advantageous, the leader has only limited influence (Shamir). In some cases, calculated followership was dependent upon power where leaders have expertise or privileged information. However, when the follower gains access to the specific knowledge or builds the same level of skill as the leader, the motivation to follow was diminished (Shamir).

Safety-based followership was steeped in the idea that followers need the security that is perceived to be provided by a leader (Shamir, 2004). Based upon this motivation, followers who feel insecure seek comfort in the leader who has an appearance of strength or knowledge and thus capable of providing safety (Shamir).

In some cases, followers were motivated to follow leaders who can provide a coherent view of the world and provide a level of order or meaning (Shamir, 2004). Such meaning-based followership was attributed to the view that the leader had answers developed through special training or as a result of learning or reflection (Shamir).

Finally, identification-based followership was tied to the previously explained idea of prototypicality (Hogg, 2001) and group dynamics as well as the self-concept of followers (Shamir, 2004). Within this framework of motivation, followers find personal identity in their association with groups or organizations (Hogg; Shamir). Shamir noted that psychoanalytic theories see a person's identification with a leader as an extension of a child's identification with a parent as a mechanism for fighting feelings of inferiority or helplessness. In this process of identification, a follower increased their level of self-esteem (Shamir). Thus, such people are motivated to follow those who appear powerful and attractive in an attempt to be associated with such leaders based on their "referent power" (Shamir). Also, within this identification dynamic, followers may seek to associate with such leaders based on their prototypicality as they embody the attitudes and identity of the group (Hogg). In addition, theories of leadership indicated that when followers view a leader or a group or mission as representing key elements of their self-concept in the form of values and identities, such individuals had a particularly high motivation to follow (Shamir, House, & Arthur, 1993). This motivation to follow had strong connections to an internal commitment of followers to sacrifice on behalf of the leader or group (Shamir).

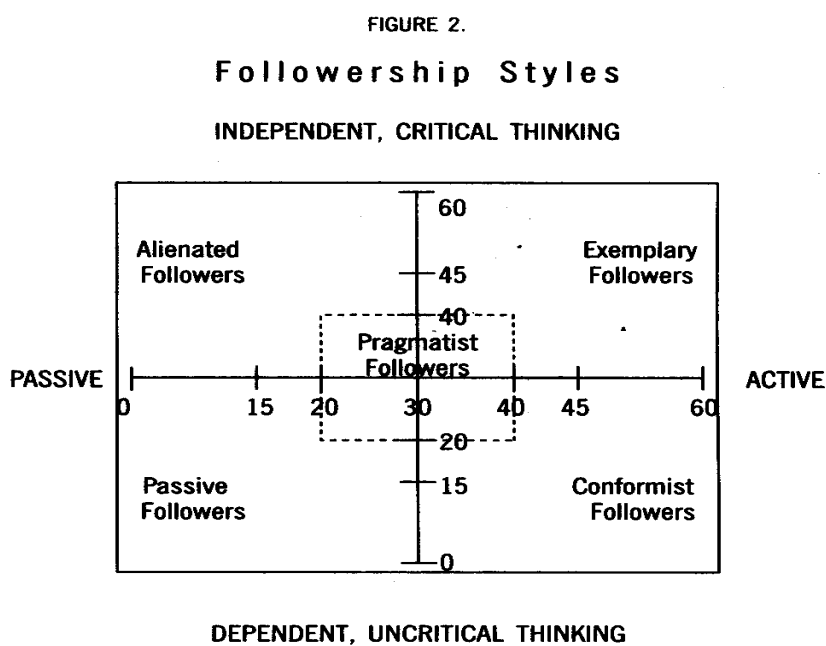
Based on these various theories, it becomes clear that the motivations of followership are many. Such follower motivations run the gamut ranging from the simple

desire for basic needs, such as safety and belonging, to the social need to work collaboratively with others to accomplish altruistic aims. For some individuals, followership appears to be a path to achieve self-actualization through a personal transformation toward becoming a leader. Overall, it would appear that these various followership motivations are linked, at least in part, to either a connection with leadership or the general dynamics within an organization. In many respects, such motivations would seem to provide at least a partial explanation of why followers choose to follow. However, additional evidence in answering this issue might also be impacted by the specific capabilities and the role played by the follower. Followership literature addresses variations of followership abilities through several typologies. For example, Chaleff (2003) offered a view of followers defined based on a matrix of support and challenge to the leader. Kellerman (2008) provided a differing view of followership based on a “level of engagement” (2007, p. 87) and categorized followers along a continuum given their degree of involvement with leaders and the organization. Of these characterizations of followers, the definitive work developed by Kelley (1992) provided a foundation in this area of the study.

Kelley (1992) proposed a classification of various followership styles in a matrix format based on two key dimensions: engagement and critical thinking ability. In defining engagement, Kelley differentiated between passive followers and those described as active, i.e. those who take initiative. Critical thinking was arranged on the opposing axis and ranges from followers who possess independent critical thinking ability or those that can think for themselves, accept constructive criticism, and were comfortable with their skills as opposed to those followers who are dependent and exhibit

a lack of critical thinking ability (Kelley). Based on the model shown below, five specific followership styles emanated from this grid as a result of the specific combinations contained in the mix, including: alienated, passive, conformist, pragmatic, and exemplary followers (Kelley).

Figure 2: *Followership Styles*



Note: From *The Power of Followership* (p.97, by Robert E. Kelley, 1992, New York: Doubleday. Copyright 1992 by Robert E. Kelley. Reprinted with permission.

Alienated followers were a unique combination of independent critical thinking ability and passiveness. While alienated followers may have once been exemplary followers, these individuals see themselves as victims and channel energies into fighting

portions of their organization or direct hostility toward their leader (Kelley, 1988, 1992). To move to the more desired exemplary follower style, alienated followers must overcome their conflicts within the organization and positively direct their energy (Kelley).

The passive style, positioned directly opposite the exemplary follower, reflect those individuals who have been described as “sheep” (Kelley, 1988, 1992). These followers were inactive members of the group who lack initiative and seek constant direction from their leader (Kelley). As such, the passive follower does not complete anything beyond their assigned responsibility for a task (Kelley). Furthermore, Kelley noted that passive followers may simply have not developed adequate followership skills.

A conformist followership style remains active within the organization, but lacked in critical thinking ability. This follower prefers working environments choosing order over outcomes (Kelley, 1992). In terms of proximity on the model, they stand opposite the exemplary follower and desire structure and predictability over freedom to find new solutions. As such, the conformist adds little apparent value to the organization (Kelley).

The pragmatic follower was characterized as being in the middle of the road. This follower was neither particularly active within their organization or demonstrates critical thought processes (Kelley, 1992). Pragmatists were described as performing required tasks, but remain sensitive to internal politics and, consequently, do not take strong positions within the group (Kelley). Often described as “survivors,” these followers choose a path of safety and have limited effectiveness (Kelley).

The final followership style combined the power of critical independent thinking and engagement within the organization and was labeled as the exemplary followers.

According to Kelley (1988), these self-starting followers were distinguished by several specific qualities. First, exemplary followers manage themselves well by displaying independent thinking ability, possess the skill to exercise personal control, and were able to work without close supervision (Kelley). As such, leaders can safely delegate tasks to these followers who can be trusted to take the initiative and add value in completing their assigned work in the best interests of the organization. Kelley (1988, 1992) described a second quality of exemplary followers as their commitment to the organization and a purpose, person, or principle outside themselves in addition to their own lives and careers. In some cases, an exemplary follower might achieve their personal purpose by channeling their efforts through the organization for which they choose to work (Kelley). For example, this might include a researcher who works for a pharmaceutical firm in search of a cure for a disease. A third quality of exemplary followers was a commitment to building personal competence (Kelley). In building this competency, exemplary followers pursue personal development opportunities, including engaging in reading beyond their field while also seeking ways to add value beyond the scope of activities within their job assignment (Kelley). The final quality of exemplary followers was the demonstration of honesty, credibility and courageousness (Kelley).

Kelley (1992) was careful to point out that the labels within his model were attached to the follower's "role" and not to the specific person. Thus, it was possible for a single individual to change styles at any point in time or situation given the response to circumstances or as a result of increased maturity or experience (Kelley). Further, while followers have a tendency to operate primarily within a specific style, it becomes

apparent that an individual can move to other areas within the model based on addressing the active/passive axis or through increased critical thinking effort (Kelley).

As indicated at the outset of this literature review, there was limited research that provided support for the constructs of followership. However, an investigation of the relationship between leadership and followership in staff nurses in a health care setting by VanDoren (1998) suggested that a vast majority of respondents demonstrated exemplary followership styles. Additional styles noted in the VanDoren study included pragmatist and conformist styles. However, this specific inquiry did not find evidence of alienated or passive followership styles (VanDoren).

In contemplating the description of the exemplary follower, it becomes apparent that this term becomes synonymous with the effective follower. Such individuals achieve a level of effectiveness which benefits both their organization and in their personal development. Building upon the idea of the effective follower and many of the traits outlined by Kelley (1988, 1992), Chaleff (2003) proposed the idea of the courageous follower. Chaleff indicated that courageous followers assume both additional responsibilities and a level of danger in performing their roles built on a platform of the courageous relationship with the leader. In performing their role, the follower must act as an agent of change for the leader in a relationship of mutual respect and honesty (Chaleff). Yet, the follower retains a level of accountability for their actions with a duty to challenge as they “lead from behind” (Chaleff, p. 15) in paradox of followership.

Chaleff (2003) outlined various dimensions of followership, each requiring an aspect of courage on the part of the follower to effectively perform their role. These dimensions include the courage to assume responsibility personally and on behalf of the

organization, to serve in a manner to relieve the leader, and to recognize and participate in the need for transformation (Chaleff).

In addition, Chaleff (2003) discussed the requirement that followers challenge leaders and the organization when they feel discomfort with policies or internal direction that conflicts with their personal sense of direction or in approaching ethical boundaries. While courageous followers value common purpose, their nerve to challenge eliminated the potential for groupthink helping the organization to make better decisions. In addition, this courage to challenge was intertwined with Chaleff's final dimension of taking moral action. Within their relationship with the leader, the follower possesses levels of power. While that power is not equal to that of the leader, the courageous follower operates out of a sense of loyalty to the purpose of the organization and has a duty to obey (Chaleff). Yet, when placed in a situation that the follower no longer believes in or evaluates as ethically challenging, the follower is compelled to take action (Chaleff). Given the idea that courageous followers are ultimately responsible for themselves, such action can include withdrawing support for the leader and organization by leaving (Chaleff).

In considering the specific dimensions which differentiate effective followers from those who are ineffective, there are many similarities to elements of good leadership. Further, whether these qualities, skills, and attributes are possessed by the leader or a follower, each has a positive impact upon their organization. Of the many parallels between leadership and followership, one specific aspect focused on building personal competence. The role of self-development was connected to Senge's (1990) idea of personal mastery within the context of the learning organization. Imbedded within the

explanation of personal mastery was the focus on continual learning (Senge). Senge's discussion of personal mastery focused on the drive toward commitment, taking initiative, and a deep responsibility for work. In the context of leadership, there appeared to be little difference between Senge's conceptualization and Kelley's (1988, 1992) parallel explication of effective followership. Moreover, Kelley acknowledged the need for effective followers to manage themselves. Again, such discussion was generally found within the context of leadership. In the case of both leaders and followers, the management of self connects to Goleman's (1997) discussion of emotional intelligence. Within the discussion of emotional intelligence, various authors discuss the importance of personal competence, which encompasses self-management, and social competence in the importance of leadership (Goleman, Boyatzis, & McKee, 2002). Clearly, such concepts also apply to followership within the dimensions of effective followership as conceived by Kelley.

Overall, Kelley (1998) noted that the distinguishing characteristics that separate leadership and followership were not intelligence or character, but simply the roles played by each party. Chaleff (2003) appeared to agree, noting that when effective followers act in certain capacities, such as the initiation of taking risks, that the lines between these two concepts begin to blur.

While there are many similarities between effective followership and leadership, they remain important, yet discrete, roles. Further, it was also apparent that leaders have tremendous wide-ranging influences and effects upon followers. An examination of research into leadership at this point helps advance the discussion of followership.

Leadership Theory Relevant to Followership

A perfunctory search of the topic of leadership finds any number of concepts and connections linked to the subject. The sheer volume of research revealed that authors have described leadership in a variety of ways, many using compelling arguments and unique terminology. For example, Collins (2001) discussed the idea of “level 5” leadership referring to those individuals who embody a paradoxical mix of both professional will and personal humility. Other writers discussed leadership theories grounded in the style of an individual, related to situations, or based upon traits or particular skills (Northouse, 2004). In addition, while the topic of leadership generated great discussion on its own, it becomes clear that there is also a growing interest in leadership respective to its role vis-à-vis followership. Such research would seem to suggest that leaders have both a direct and indirect impact upon their followers. Within this thought process, leaders have a number of direct influences on followers including those associated with their level of authenticity, leadership type, and in regard to how followers feel about themselves. Further, followers are indirectly affected by their leaders based upon the environments they create or maintain as manifested in terms of organizational culture and climate.

While this document is not a treatise on leadership, it seems appropriate to ground this discussion in the key elements of the concept. A review of the literature quickly reveals that there is no single agreed upon definition of leadership. However, common themes offered by various writers do emerge. For example, leadership was generally conceived of as a process where one individual influences others to achieve a common objective (Northouse, 2004). Additional commonalities within various definitions offer

that leadership creates organizations and/or helps organizations adapt to changes in the environment (Kotter, 1996). Further, leadership was also conceived of as defining the future through a compelling vision, aligning people accordingly, and providing inspiration toward that dream (Kotter). Finally, other writers saw the primary role of leadership as related to teaching and the development and growth of followers (Chaleff, 2003; Tichy & Cohen, 2002).

In addition to common themes, leadership has also been described according to specific types which continue to evolve. For purposes of relating followership to leadership, the latter has been based upon several dominant theories described as transactional, transformational, or charismatic. However, again, there was no common agreement regarding the ideas and conceptions that were housed under these various labels. Further, many of these conceptions have been the subject of vigorous debate among authors based upon varying theories and research. As such, many of these models continue to evolve.

Burns (1978) first distinguished between the ideas of transactional and transformational leadership. For purposes of this review, transactional leadership was characterized as an exchange process where a leader provided a direct reward to the follower to motivate compliance (Bass, 1985, 1999; Northouse, 2004; Yukl, 1999). The operational understanding of transactional leadership was seen in those leaders who work within the confines of existing organizational structure, rules, and norms (Bass & Avolio, 1993).

To the contrary, transformational leadership was typically identified by the leader's effect upon followers (Yukl, 1999). While this model remains the subject of

ongoing development and study, transformational leaders were distinguished as those who move followers beyond their self-interests using “idealized influence (charisma), inspiration, intellectual stimulation, or individualized consideration” (Bass, 1999, p. 11). According to this typology, followers are motivated to commit to and exceed performance expectations by their leaders who heighten follower awareness of the importance of goals along with the means to accomplish them (Conger, 1999). In this process, leaders stimulate and meet the higher order needs of their followers (Conger). Such transformational leadership was further characterized as being attentive to the needs and motivations of their followers as well as working to assist them to achieve their potential (Northouse, 2004).

Charismatic leadership has often been portrayed as a derivative of the transformational leadership model. As originally proposed by Weber (1947), charismatic leadership was based on the idea that leaders possessed a quality called “charisma.” Such charisma, the term derived from Greek meaning “favor, divine gift” (Harper, 2001), was seen as a personality component within a rare breed of leader that possessed special gifts that provided them with the capacity to perform extraordinary things (Northouse, 2004; Weber). Since the original conceptualization of charismatic leadership, several models of the theory have been advanced.

While there are variations between these versions, several themes emerge. Most significantly, charismatic leaders were typically seen as having a relationship with their followers that results in exceptional accomplishment on the part of the various individuals and the organization at large (Ehrhart & Klein, 2001; Howell & Shamir, 2005). From an operational standpoint, charismatic leaders communicate high

performance expectations, demonstrate a level of confidence in the followers' capabilities to achieve such goals, take a level of risk in opposition to the status quo, and communicate a value-based vision of the future (Conger & Kanungo, 1998; Kark & Van Dijk, 2007; Yukl, 1999). Within this charismatic relationship with their leaders, followers demonstrate a willingness to transcend their self-interests for the group, engage in self-sacrifice to achieve the mission, connect with the proposed vision, and demonstrate a strong attachment to the leader (Conger, 1999; Howell & Shamir; Yukl).

According to some variations of charismatic leadership theory, the distinguishing characteristic differentiating the charismatic leader from those that are less so was the leader's ability to find dissatisfaction with the status quo (Conger, 1999). Once disenchantment with the status quo was created, the charismatic leader then creates a level of strong identification with the alternative future and builds trust by demonstrating how such goals might be accomplished (Conger). For some theorists, charismatic leaders focus their efforts upon the self-concept of followers, i.e. their sense of identity (Kark & Van Dijk, 2007; Lord & Brown, 2004). Such leaders tie follower self-concepts to the goals of the organization so that they become valued parts of the individual's make-up (Conger). In doing so, charismatic leaders emphasize the intrinsic value of work which becomes a vehicle for expression on the part of followers (Conger).

A final important aspect of charismatic leadership theory was the relationship between the leader and the follower. According to Howell and Shamir (2005), charismatic links may be either personalized or socialized depending upon the follower's self-concept. In a personalized situation, the follower's relationship with the leader was based on personal identification whereas a socialized relationship provides the follower

with a means of expression of values based on the collective (Howell & Shamir). In many respects, this desire for follower expression or identification with the leader seems to parallel Kelley's (1992) "paths to followership" model where followers seek either to express or transform themselves in the process. However, it should also be noted that charismatic leadership may be fragile. Weber (1947) suggested that the charisma will disappear when that leadership fails to benefit the followers.

Irrespective of the typology considered, it seems clear that leadership has an effect upon followers within an organization. A leader can impact their followers indirectly through the creation of the environment. In addition, leaders also have a direct influence upon followers through their behaviors and the subsequent relationships that evolve.

It should be noted as well that no discussion of the dynamic between leaders and followers is complete without acknowledging the potential of a "dark side" to this relationship. History has provided repeated examples of evil leaders who have controlled, coerced, or enabled their followers in perpetrating illegal or immoral acts. For instance, Adolf Hitler's vision enabled Nazi followers to murder millions of people in death camps. More recently, Jim Jones, a charismatic leader working under the guise of religion, coerced the mass suicide of his followers. Without going into great depth on this aspect of the topic, the document has chosen to focus on the more positive interactions between leaders and followers.

Creating Positive Organizational Environments

Typically, the indirect influence of leaders upon followers can be seen in the environmental conditions described within the context of both organizational culture and climate. A number of authors argue that leaders are critical in establishing and managing culture to enable the organization to handle the challenges of the marketplace (Bass & Avolio, 1993; Latour & Rast, 2004; Schein, 2004; Tichy & Cohen, 2002). Within the culture, leaders also define the specific mission and primary tasks to be accomplished as well as being charged with the role of sense-making for the organization (Densten, 2005; Levinson, 1980). Leaders have tangible influence upon environments as reflected in empirical research suggesting that there was a positive relationship between the emotional climates and organizational performance as measured by strategic and outcome growth (Ozcelik, Langton, & Aldrich, 2008). Additional research supports the premise that a leader's positive emotional management practices impacts both individual and group performance (Ozcelik, et al.). Moreover, leaders influence followers' task behaviors through their willingness to take risk as identified in self-regulatory theory (Higgins, 1998). Within this concept, evidence suggests that followers who perceive a leader as having a promotion focus are more willing to take risks and experiment even at the prospect of making errors whereas such leaders with a prevention focus prime followers who are more inclined to maintain the status quo (Kark & Van Dijk, 2007). While less tangible, such leadership influence also fostered positive environments, which are manifested in trust-building with their followers, empowering behaviors, and other aspects that build psychological ownership.

The development of trust appears to be an elemental cornerstone in the effective organization and was a key factor in the organization's ability to handle ongoing environmental threats and challenges (Moye & Henkin, 2006). Trust was generally described as a psychological state with an intention to be vulnerable based upon the likelihood of positive intentions and behaviors of another (Tanoff & Barlow, 2002). The development of trust was viewed as an essential component of leadership and takes place through several critical behaviors including manifesting ability, benevolence, and integrity (Lapidot, Kark, & Shamir, 2007). Further, leaders build trust through engaging followers in an environment of total open communication, by providing honest feedback to followers they work with, and in sharing information (Avolio, Gardner, Walumbwa, Luthans, & May, 2004).

According to Chaleff (2003), trust was seen as the primary factor upon which a follower evaluates a leader. At the same time, the development and maintenance of trust with followers appears to be a delicate balance on the part of the leader. Research indicated that followers are generally more likely to recall incidents of leader behavior that erode trust versus those that build trust, which supported the widely accepted idea that it is easier to gain trust initially rather than restore it once it has been damaged (Lapidot, et al., 2007).

In addition, the development of trust between the leader and follower appeared to be intertwined with a variety of other positive behaviors which also relate to organizational effectiveness (Moye & Henkin, 2006). In particular, in a study of salaried workers in a Fortune 500 company, Moye and Henkin found that those employees who felt empowered tended to have higher levels of trust in their leaders. While various

definitions of empowerment have been put forth, this multi-faceted concept generally focuses on the delegation of power from higher levels within an organization to individuals at a lower level, providing them with the independent decision-making ability (Carson & King, Jr., 2005).

Empowerment was generally seen in four cognitions of an individual's orientation to their organizational role, including meaning, competence, self-determination, and impact (Conger & Kanungo, 1988). Spreitzer (1995) suggested that these cognitions comprise the motivational construct identified as psychological empowerment. Such cognitions defining psychologically empowered behavior appear to closely parallel the qualities of exemplary followers. A study of mid-level Fortune 500 companies indicated that psychological empowerment significantly and positively related to employee self-esteem and access to information about the mission of the organization (Spreitzer). Such findings suggest that leaders can create positive working environments by communicating the organizational mission and goals as well as building individual competence in their followers, thus placing their entities in a better position to compete. Further, leaders should value those exemplary followers who assist the organization in achieving its purpose.

The available literature regarding trust also suggested that it has a positive relationship with organizational citizenship behaviors (Avolio, et al., 2004). Organizational citizenship refers to discretionary behavior on the part of individuals that is not contemplated by the formal reward system, yet promotes the effective functioning of the organization (Organ, 1994, 1997). Following an exhaustive review of the research, Organ concluded that a general sense of morale within an entity was an antecedent of

organizational citizenship behavior. Considering that leaders impact morale through the creation of culture, it seems logical to conclude that leadership has an indirect relationship upon followers who exhibit organizational citizenship behaviors to the benefit of the entity.

Research supported the idea that leaders indirectly affect followers and their organizations through the creation of healthy working environments. In addition, there are also theoretical constructs and supporting research that indicate a relationship between leaders and their direct influence upon followers and the organization as well. Notably, Weymes (2003) argued theoretically that the success of an organization was in the formation of sustainable relationships between leaders and followers where the primary purpose of leadership is to influence the feeling and emotions of those associated with the organization. This influence is exhibited in a variety of leadership activities, but in particular by priming aspects of follower self-concepts and through authentic behaviors. These influences appear to result in positive follower responses and are integral in creating a level of psychological ownership that further benefits the organization.

Lord and Brown (2004) offered that leadership power was based primarily in the ability of leaders to shift how followers feel about themselves. Building upon this idea, the primary notion of leadership was anchored in a social process where leaders change the conception of follower self-concepts shaping their salience to varying aspects or creating new dimensions (Lord & Brown). A follower's "working self-concept" was "the highly activated, contextually sensitive portion of the self-concept that guides action and information processing on a moment-to-moment basis "(Lord & Brown, p. 17). Within

that self-concept are a confederation of selves that vary, yet remain complex so that only one can be active at any given time (Lord & Brown). These self-identities were described as individual, relational, or collective (Lord & Brown).

Those followers with an individual focus emphasize attributes that differentiate themselves from others (Lord & Brown, 2004). Followers with a relational self-identity are concerned with the perceptions of how others see them (Lord & Brown). Under this idea, feedback from leaders was a primary determinant of this view through performance reviews (Lord & Brown). Research has indicated that such leadership appraisals have a powerful effect as leaders with high expectations of subordinates showed higher levels of performance (Eden, 1992). The collective level involves the social dynamic and is connected to organizational culture. Where group identity was salient, group members see themselves in relation to the member prototype and evaluate themselves accordingly (Hogg, 2001). Thus, charismatic leaders within such an environment have a powerful effect upon followers shifting their identities from an individual view to a more collective approach (Lord & Brown).

Leaders prime follower identities making them more accessible in a number of ways. In particular, leaders have direct influence upon followers through verbal and non-verbal communication. According to research by Greenburg (1994), the meaning of an organizational message can be influenced by the communication style of the leader. For example, the use of inclusive language by charismatic leaders, such as “we” and “us,” reorient followers from an individual focus to a more collective level (Lord & Brown, 2004). Leaders also play a key role in priming the regulatory focus of followers through symbolic and performance acts designed to communicate values and also appeal to the

collective focus to establish the organization's tolerance for risk-taking (Kark & Van Dijk, 2007). Further, leaders directly influence the regulatory focus of followers through role modeling (Kark & Van Dijk).

Authentic behavior on the part of leaders also has a direct effect upon followers. Authenticity was generally described as a concept where an individual is true to themselves (Ilies, Morgeson, & Nahrgang, 2005). Often conceived of as a root concept of transformational, charismatic, and ethical leadership, authentic leaders were able to engage, motivate, and obtain involvement from followers through personal identification and via social identification with the organization (Ilies, et al.; Kark & Shamir, 2002). Further, authentic leaders were aware of their beliefs and values, were perceived by followers as genuine and trustworthy, and build upon the strength of followers while expanding their horizons in a positive organizational context (Gardner, Avolio, Luthans, May, & Walumbwa, 2005; Ilies, et al.).

Moreover, authentic leaders influence their followers through modeling positive behaviors. Those leaders who model positive behavior influence the level of optimism in followers which ultimately fosters positive attitudes in higher levels of performance (Avolio, et al., 2004). In addition, leaders who model positive behavior also develop authentic followers (Avolio, et al.; Gardner, et al., 2005; Ilies, et al., 2005). A variety of research studies provided evidence to support the idea that followers of leaders in quality relationships reciprocate in becoming more authentic through such a process (Ilies, et al.). While many authors see that a primary responsibility of leaders is to develop other leaders, it seems clear that the first steps for strong leaders in doing so are in promoting effective followership (Banutu-Gomez, 2004; Tichy & Cohen, 2002).

Authentic leaders also have direct impact upon followers through behaviors generally associated with positive psychology. While positive organizational scholarship is not confined to a single theory, the concept is built upon the idea of human potential and includes enablers, motivations, and outcomes associated with an emphasis on the positive (Cameron, Dutton, & Quinn, 2003). Evidence of positive psychology was seen in a variety of organizational outcomes, such as the previously discussed idea of citizenship behaviors (Cameron, et al.), but also in the intrinsic motivations of followers, such as empowerment and flow. Flow was described as a psychological experience characterized by positive arousal and effect along with a level of enjoyment, energy, excitement, and concentration (Bateman & Porath, 2003; Csikszentmihalyi, 2003). Flow takes place when individuals feel a balance between challenges and abilities and when a level of autonomy was perceived (Bateman & Porath; Csikszentmihalyi).

Such positive psychology also appeared related to conditions that are associated with psychological ownership. The concept of psychological ownership was described as a state where individuals feel as though they are responsible for a portion of the operation including customers or their organizational unit (Avolio & Reichard, 2008). Through developing the related dimensions of fit, sense of self, and self-efficacy, those followers who see themselves as part-owners of an organization feel empowered to complete needed tasks for the benefit of the entity. This outcome arguably makes the organization better able to compete and to meet the challenges of the marketplace.

While many early theorists surmised that leaders had all the answers as part of this “romanticized conception” (Meindl, Ehrlich, & Dukerich, 1985, p. 79), the available research and an increasingly complex business environment seems to require that

leadership success is connected with developing courageous and exemplary followers. Even though there appears to be little disagreement that leaders have a strong influence upon their followers, the literature also suggested that leaders cannot control the identities of their followers (Collinson, 2008). A post-structuralist view offered that the identities of leaders and followers were generally “a condition and a consequence of one another” (Collinson, p. 322). Moreover, based upon the level of interdependence between leaders and followers, both rely upon each other to create conditions of mutual influence (Reicher, et al., 2005).

The research of Dixon and Westbrook (2003) revealed that follower behaviors were measurable and that followership was discernable at all levels of the organization. Intuitively, the case can be made that those leaders who invest in supportive cultures and internal relationships create conditions for organizational success. In such an environment, courageous and exemplary followers are encouraged to provide feedback, offer solutions, and challenge “group think” moving their organizations toward accomplishing their objectives (Chaleff, 2003). Such organizational conditions that emphasize the talents of strong followers also provide an internal check and balance to potentially destructive leadership (Padilla, Hogan, & Kaiser, 2007).

In many respects, the existing research regarding followership has only scratched the surface. Based upon the literature that is available, followers have important and wide-ranging effects upon both their leaders and organizations. This inquiry is designed to advance our knowledge of this developing field of study.

Chapter 3

Research Design and Methodology

Research Questions

Given the nature of this interpretive research study, the aim of this project was 1) to examine the motivations and inspirations of followers who have engaged in an exemplary act of followership, and 2) to gain an understanding of how leaders and organizations contributed to followers' engagement in an exemplary act. The central question in this study was: "What conditions or factors motivated followers to engage in an exemplary act of followership?"

In addition to this primary question, it was hoped that the research would provide insights into several secondary questions to assist in understanding the motivators of those individuals. In particular:

- What was the role of the leader in contributing to or motivating an exemplary act of followership?
- What attributes of the organization contributed to or motivated an exemplary act of followership?
- What intrinsic motivating factors contributed to followers' engagement in an exemplary act of followership?
- What other conditions or extrinsic motivating factors contributed to followers' engagement in an exemplary act of followership?

Research Design and Methodology

The vast majority of present available research regarding followership was anchored in a positivistic epistemological approach. This approach served to quantify “how we know what we know” (Crotty, 1998, p. 8) about aspects of followership by portraying the world in observable and measurable facts (Thomas, 2003). Yet, given the concept of followers and the dynamic relationship they maintain with their leaders and organizations, it seemed that an approach less concentrated in objective explanation had considerable merit to achieve a level of understanding of the nature of followership. While the field of followership recognized the term “exemplary follower” (Kelley, 1988, 1992), there was little, if any, literature regarding the motivating factors of exemplary acts performed by followers. The purpose of this study was to examine the motivations and inspirations of followers who have engaged in an exemplary act of followership. In this inquiry, I also sought to better understand how leaders and organizations contributed to or motivated followers who performed exemplary acts. This unique phenomenon – exemplary followership—was specifically chosen, as it was felt that cases representing this phenomenon would provide the best means to distinguish followership motivations and inspirations. However, I hope that the findings of this research would provide broader insights into understanding the factors that inspired followers to follow on a day-to-day basis with an eye toward building a better partnership between followers and leaders while enhancing the overall effectiveness of organizations.

To attempt to gain such an understanding of the motivating factors and inspirations of exemplary acts of followership, an interpretive research approach was appropriate in bridging this epistemological gap (Crotty, 1998). Interpretive inquiry was a

legitimate mode of exploration into human and social science (Cresswell, 1998). Such an interpretive approach focused more upon the understanding of meaning or the experience that constituted knowledge (Merriam, 1998). It was an inductive mode of inquiry that attempted to comprehend and explain the socially constructed realities of individuals (Merriam). My hope was that the findings generated from this interpretive analysis would reveal patterns which would provide a greater depth of understanding of followers and their apparent motives in general (Stake, 1995).

Within the interpretive framework of inquiry, I employed a case study approach to gain an understanding of the exemplary acts of followership. As one of the five great traditions of qualitative inquiry, a case study was “an exploration of a ‘bounded system’ ...through detailed, in-depth data collection involving multiple sources of information rich in context” (Cresswell, 1998, p. 60). While case study research investigated pre-defined phenomena, it did not involve manipulation of or explicit control of variables within the process, but sought only understanding of the phenomenon (Darke, Shanks, & Broadbent, 1998). Such a methodology was chosen by researchers because case studies frequently offer explanations of why entities act as they do (Thomas, 2003).

Case studies are “more than merely an observer’s data” (Brown, 1998, p. S79); they are a research vehicle to investigate an event or situation that the researcher believes may exhibit some general concept. Such research was used for various purposes including developing or testing theory or simply to describe a phenomenon of interest (Darke, et al., 1998). Further, an interpretivist approach to such research was not

concerned with the repeatability of the phenomenon, but only in gaining a deep understanding of the phenomenon (Darke, et al.).

According to Stake, we become interested in cases both for their commonality and uniqueness in an endeavor to understand them (1995). Individual cases may be either complex or simple, yet researchers attempt to seek what was both common and particular in each specific instance (Denzin & Lincoln, 2003). The learning outcome of a case study investigation was a “naturalistic generalization” (Stake & Trumbull, 1982) where the reader of the report comes to understand the phenomenon as told as if they had experienced it themselves (Denzin & Lincoln).

While the temptation may be to label everything a “case,” it would be incorrect to do so, given that cases are “a specific, a complex, functioning thing” (Stake, 1995, p. 2) distinguished by several characteristics. In particular, they have a level of “boundedness” (Stake) meaning the individual case is bounded by place or time and can be described as an event, program, or activity all within a context (Cresswell, 1998). Moreover, rather than seeking random examples of cases, researchers use purposeful sampling as those that may be most useful (Cresswell). As such, external validation which speaks to the replication of empirical research was not a concern for this interpretive study as each case was chosen precisely to “maximize what we can learn” (Stake, p. 4). Finally, the data collection process in case study research was exemplified by drawing upon multiple sources of data, including documents, observations, interviews or other materials (Cresswell).

While cases might be classified as “intrinsic” or “instrumental,” the methodology for this study focused on a collective case study approach (Stake, 1995). Collective case

studies, also known as multiple case studies, refer to several cases that are bound together categorically (Stake, 2006). In this methodology, a collection of individual cases had a common condition or characteristic (Stake, 2006). Such a group of cases has been referred to as a “quintain” defined as “an object or phenomenon or condition to be studied” (Stake, 2006, p. 6). Organized around a research question or series of questions pertaining to the group of cases, the object of this type of examination surrounded what the various individual cases tell us about the quintain as a whole (Stake). Ultimately, the aim of a multiple case study research project was to come to understand the quintain (Stake).

Case Study Selection Criteria

Within this multiple case study analysis regarding exemplary acts of followership, the unit of measure was each individual bounded case. As noted below, each case was bounded by the exemplary act as performed by the individual, as it was the personal motivation and inspiration that was the critical factor. Each case was further bounded by a time parameter as the study was focused specifically on the time frame, in which the exemplary act was conceived and performed.

Cases, considered for this study, were measured against various criteria to help ensure that they were representative of an exemplary act of followership. For the purposes of this investigation and given the lack of available literature on this segment of the field, I defined an exemplary act of followership as “an extraordinary activity or exploit of a follower within an organization.” Also, given the nature of this inquiry, the cases were chosen from a variety of disciplines (e.g., military, civil service, politics,

business) to provide for additional breadth and variation to the study as well as to determine if there were similarities or patterns in the findings from the followers engaged in varying types of exemplary acts. No more than a single case from a specific field was chosen for study. Moreover, there was no objective measure for defining an exemplary act of followership. Conceivably, even those individuals who actually performed such acts might debate whether their personal exploits were considered as “extraordinary.” As such, a number of guiding points were developed to help aid the researcher in selecting the exemplary acts. The primary criteria used for identifying specific cases that might fit into this quintain and achieve the purposes of this study included:

- The exemplary act of followership needed to be well-documented and recognized in some manner by either the organization itself or an independent third-party entity. This standard would help ensure that the act had been acclaimed to the extent that it met the definition of an “exemplary act” as noted above.
- The specific act was to have occurred in the recent past, but at least within the last 10 years. This time frame was chosen given the nature of exemplary acts. Typically, such acts were seen as uncommon and not occurring on a regular basis. Further, given the nature of such acts, they were seen as being memorable to the individual participant of the act itself. Considering all these factors, a reasonably large time period was chosen to allow the researcher to choose the best available cases to understand exemplary acts of followership.
- The follower who performed the act must have been a member of their organization for no less than two years prior to the performance of the

exemplary act. This two-year time frame was selected in order to gauge the impact of belonging to an organization.

- It became clear from the literature that in many cases, there was a fine line between followers and leaders. Yet, for this inquiry, a follower was seen as having a variety of duties, including the potential for any number of levels of leadership responsibility. At the same time, based on evidence provided by Dixon and Westbrook (2003), followership was discernable at all levels of an organization. This study distinguished followers as those who were not operating in an assigned leadership role within the context of the performed exemplary act. Moreover, within the context of the exemplary act, the followers were able to identify the assigned leader(s) as someone other than themselves.

According to Stake (2006), the optimal outcome for multiple case studies was a range of cases from four to ten. Given this range as a guide, I selected five distinct cases involving individuals who had engaged in an exemplary act of followership. In addition, even though my intent was to choose cases that would maximize the amount of learning possible, my sample universe was limited to some degree to the relative location of the subjects given my lack of resources. All cases selected were based on occurrences that took place in the United States. Moreover, while I had some concerns about the willingness of the subjects to discuss their individual exploits, these fears were largely unfounded.

Data Gathering

Given the selection criteria, I began a general search for relevant cases with an e-mail to my existing personal contacts, including advisors, faculty, and other available friends and acquaintances. In search of cases, I also made proactive contact with leaders of disciplines that were likely target areas of study. In addition, a general Internet search and an appropriate review of available documents was undertaken to discover potentially relevant cases. Ultimately, “word of mouth” was a primary source in identifying potential cases and the followers that were associated with these exemplary acts.

Prior to the selection of each case and interview with the subjects, the data collection procedures involved a review of available documents (Cresswell, 1998). While this document review guided the selection of cases, it also served to help direct my data gathering process by defining areas to probe in the face-to-face interviews conducted with the individual subjects. A document review in the form of reading published accounts of the case, such as newspaper or magazine articles, official records, correspondence, or other written materials was an accepted method of data gathering in qualitative inquiry (Stake, 1995). Such practice was useful in organizing for planned interviews of the actual subjects (Stake). Additional interviews of individual witnesses or those people with intimate knowledge of the exemplary act of followership such as the assigned leader were conducted to aid triangulating the data.

Given potential issues regarding both the nature of the inquiry and/or the willingness to discuss the specific details of the event in question, the primary followers associated with each case were contacted and asked if they wished to participate in the study. As the researcher, I fully described the study to those potential participants and

only those individuals, who were completely willing to discuss the specific event in question, were part of this inquiry. The participant was also asked to provide the names of one to three individuals with knowledge of the exemplary act (e.g., the leader, peers, witnesses) who could be contacted for a secondary interview.

The primary data-gathering tool for this research study was face-to-face interviews with the actors in the cases. Interviewing has been described as “the best technique to use when conducting intensive case studies” (Cresswell, 1998, p. 72; Stake, 1995). A semi-structured interview guide was constructed to cover the essential elements of the case (See Appendix A), but it also allowed me the flexibility to probe in areas of interest developed during the conversation (Cresswell; Merriam, 1998). All questions were open-ended allowing the actor within the case to answer as needed (Cresswell). Based on the nature of the subject matter and the length of the structured questionnaire, each participant interview was approximately three hours in length. However, I retained enough flexibility in the process to spend as much time as needed to sufficiently cover the subject matter of each individual case.

Each interview was recorded and transcribed by a third-party contractor to document the session for later analysis (Cresswell, 1998; Merriam, 1998). In addition, I reviewed the prepared transcript of each interview while listening to the discussion to verify the content and made changes to the text where warranted. Moreover, I took field notes during the interviews for later reference during the analysis and report-writing phase of the study (Merriam). Finally, immediately following each interview, I documented my observations, reactions, and thoughts about each participant through reflective notes (Cresswell).

Prior to conducting the interviews, each of the subjects signed an IRB Consent Form agreeing to participate in the study. Depending upon the magnitude and notoriety of each potential case, I also advised each subject that privacy might be difficult to guarantee. Each subject was advised of the confidentiality issue and offered the ability to review the preliminary case findings prior to being published. Further, each of the subjects was told that their names and other non-essential background details would be altered in any subsequent report.

Considering that leadership and followership were interdependent concepts and symbiotic in nature (Goethals & Sorensen, 2004; Reicher, et al., 2005), I further triangulated the findings of the subject interviews with the observations and input of those leaders who had insights into the exemplary act. If the leader was unavailable or did not have specific knowledge of the exemplary act in the eyes of the subject, the secondary interview was conducted with available peer observers. Those secondary interviews with participant referrals typically lasted well under one hour. All of the confirming interviews were conducted by telephone given the location of those individuals. An open-ended questionnaire (See Appendix B) served as the basis for gathering those leader or peer observer perceptions of the exemplary act.

Data Analysis

“Data analysis is the process of making sense out of the data” (Merriam, 1998, p. 178). In this inquiry, several approaches were used in analyzing the data, including direct interpretation and categorical analysis (Stake, 1995). Initially, each of the interviews were carefully reviewed seeking patterns in the data using the constant

comparative method (Miles & Huberman, 1994). According to Merriam, this method of analysis was acceptable for evaluating data in qualitative studies. Essentially, the constant comparative method “involves comparing one segment of data with another to determine similarities and differences” (Merriam, p. 18). Such units of data must meet two criteria according to Merriam; they must be heuristic and also be reduced to the smallest essential element that can stand on its own. Within this process of analysis, data was then grouped together based upon similarities in dimensions and categorized accordingly (Merriam). Merriam indicated that “the overall object of this analysis is to seek patterns in the data” (p. 18). Data analysis was a complex process involving ongoing analysis of data, inductive and deductive reasoning, and interpretation which ultimately constitute the findings of a study (Merriam).

At its most basic level, the analysis of the data involves coding, which Ryan and Bernard indicated, was the “heart and soul of *whole-text analysis*” (2003, p. 274). The process of coding involved assigning codes to contiguous units of data to serve as tags for later retrieval and to serve as values assigned to “fixed units” (Ryan & Bernard, p. 277). Within this study, there was a focus on those factors that contributed to the respondent’s attribution of followership. Data from such interviews was also coded based on the available findings using the “find” function of Microsoft Word to determine any categories of findings that might become evident through specific words and potential reoccurring phrases and ideas. Such analysis took place for each individual case in the hope of developing petite generalizations that regularly occurred in finalizing a report for each situation (Stake, 1995).

Similarly, those same tools were used in the examination of the quintain and the findings that applied on a cross case basis. Each of the individual cases was reviewed in the context of one another in an attempt to find patterns in the data. The process was supplemented through building possible categories across cases which could then be reviewed for specific reoccurring terms, phrases, or ideas in the data. The verification of data on a cross case basis was aided through triangulation and member checks, as described below, that helped develop any general reoccurring themes in the findings which might be characterized as assertions (Stake, 1995). Linking themes and concepts were displayed through the use of key quotes from the dialogue to communicate themes through visual means (Ryan & Bernard, 2003). Presenting the data in this manner was “widely used method for describing themes” (Ryan & Bernard, p. 282) that arose in the analysis process.

Validity

While case study research was an accepted method of qualitative inquiry, one criticism of this epistemological approach was the validity of the resultant findings. Several strategies were employed to enhance internal validity of this study, i.e. “how the research findings match reality” (Merriam, 1998, p. 201). Given that internal validity was contingent upon the meaning of reality for the actors, the primary strategies included member checks and triangulation (Merriam).

Member checks, which involved obtaining the input from the research subjects regarding tentative interpretations of results, were employed at several points in the research process (Merriam, 1998; Stake, 1995). Following the initial collection of data,

the interview results were transcribed using an independent service. I then reviewed the transcription while monitoring the audio tape to ensure accuracy. Within three weeks of the interview, each respondent was given three additional weeks to review the transcripts of the interview, to make modifications to clarify intent and to verify the content, and to return a final transcript. Following the analysis of all case studies within this project, member checks were again used to gain input on any resultant themes to aid in verifying content and to gather any additional reactions from the subjects.

Verification of emerging themes in the research process was also accomplished through triangulation (Jick, 1979; Merriam, 1998; Stake, 1995). Available sources of data on each case were collected. Such sources included a review of documents that had pertinent information about the case as well as background data, participant interviews, and secondary referral interviews with others who had direct knowledge of the case. In the analysis of the original case studies, methodological triangulation, i.e. comparing direct observations with records, were done when appropriate to increase the validation and confidence in the final interpretation (Stake). Further, triangulation was also used in the cross case review as part of the final analysis and in completion of the final report.

Conclusion

Given the recent emergence of this distinct topical area and the general lack of research on the subject, this study sought to contribute to the knowledge of followership. The literature review presented above suggested a strong theoretical basis regarding followership as a foundational starting point for such an examination. For example, the work of Dixon and Westbrook (2003) demonstrated both discernable and measurable

levels of followership taking place throughout an organization. In addition, the literature further suggested that the world had become increasingly complex and that theories of leadership now recognized the importance of followers as worthy partners in successfully pursuing organizational goals (Bennis, 1999; Chaleff, 2003; Hollander, 1995; Lord & Brown, 2004). Moreover, while a variety of followership styles exist, followers have power and the ability to assist their organizations in making meaningful change (Chaleff; Kelley, 1988, 1992). Those leaders who understand the motivations of followers and can create supportive organization structures in place will be best able to meet the demands of an ever-changing world.

Despite the importance of followership, a review of the available literature revealed few empirical studies regarding followers and aspects of followership. Further, those authors dedicated to researching this field had issued a general call for research to better understanding followers at large (Chaleff, 2003; Howell & Mendez, 2008; Kelley, 2008). However, the available inquiries regarding the topic of followership did present some overriding themes. Specifically, the vast majority of such inquiries appeared to approach research of followership from the perspective of the leader or the organization. Given the nature of followers in relation to their leaders and the entities they associate with, this seemed logical. However, the nature of such research did not necessarily gain the perspective of followers to help understand their motivations in their role. A second theme in the followership literature appeared to be the epistemological grounding of such inquiries. The bulk of the research appeared to be framed using a positivistic construction which largely sought to quantify the findings. Little of the available work regarding followership took an interpretive approach to understanding the driving forces that

motivated followers. While the term “exemplary follower” (Kelley, 1988, 1992) was noted in the literature, little, if any, work had been devoted to investigating the extraordinary acts performed by followers. This study intended to bridge that gap and provide insights from followers who had performed exemplary acts while providing such this learning to the benefit of other followers and organizations.

In conducting this interpretive multiple case study project, the aim was to elicit specific themes from the findings that spoke directly to the motivations and inspirations of followers. In proceeding with this research inquiry, a primary issue was whether such motivations were intrinsic to the individual or could be influenced by extrinsic factors. In examining extrinsic aspects, this study was designed to offer insights into understanding how leaders potentially influenced and inspired their followers. In addition, the findings also provided possible insights into how the mission of the organization encouraged action on the part of followers. Finally, there was the possibility that the typical influencers noted above have lesser effects upon followers and that their exploits were motivated by some unknown factor; the emergent multiple case study design described above fostered this exploration.

Chapter 4

Results – Case Study Reports

Restatement of Purpose

The purpose of this interpretive research study was to examine the motivations and inspirations of followers who have engaged in an exemplary act of followership and to gain an understanding of how leaders and organizations contribute to followers' engagement. The body of existing research regarding followership was limited in general with the vast majority of the inquiries, focused on the subject from a positivistic epistemological standpoint. This examination was anchored in an interpretive approach designed to bridge that epistemological gap.

At its core, the subject of this research was based on a central question which contemplated those conditions or factors that motivated followers to engage in an exemplary act of followership. For the purposes of this study, an exemplary act of followership was defined as “an extraordinary activity or exploit of a follower within an organization.” In addition to the primary question, several secondary questions were also posed in the study to obtain a greater understanding of the motivations of those individuals who performed the exemplary acts. Specifically, this aspect of the research was interested in examining how the role of the leader, the attributes of the organization, any personal intrinsic motivating factors, or other conditions or extrinsic motivating factors contributed to or motivated an exemplary act of followership. Further, the study was designed to investigate a series of exemplary acts of followership from a variety of fields in order to discern any resulting themes, which would add to the body of knowledge regarding followership. This chapter will report the findings of five

individual case studies, chosen for their uniqueness in relation to the central question posed above.

According to Stake, the “write-up (of the case) can be organized any way that contributes to the reader’s understanding” (1995, p. 122). To aid in building the reader’s grasp of each case, I have reported on each in a narrative format, using names or pseudonyms of the individual participants to respect the confidentiality and privacy of the subjects. In some cases, I have opted to use pseudonyms for subjects, peers/leaders and/or organizations in this review given the facts of the case despite receiving the requisite permission of the parties. Such a presentation was done for the protection of the parties.

Each case study has been presented broken into various sections to aid in the reader’s understanding. These sections include:

- 1) A summary narrative of each story with appropriate background to acquaint the reader to the case;
- 2) The identification of primary motivations or inspirations pertinent to the case from the perspective of the subject and the peer/leader; and,
- 3) Analysis and construction of meaning of the case based upon the motivations from the subject from the perspective of the researcher. The final portion of each case report regarding the findings of the whole case will also serve as a starting point in answering the research questions posed for the study.

It is further noted that each case provided only a glimpse into the lives of the subjects and the situation. The outcomes portrayed in the cases were not intended to represent the subjects or peer/leaders as whole people. As indicated above, each of the

various exemplary acts took place in a wide range of time periods, but represented only a fraction of the lives' of the research participants.

The final portion of this chapter will identify the cross case themes and patterns that emerge in regard to the motivations and inspirations of the followers who have performed the exemplary acts identified in the five-case quintain. Please note that the words "themes" and "patterns" will be used interchangeably within the discussion. Such results reflect what Stake (1995) referred to as petite generalizations that regularly occurred between the cases and were offered in hopes of greater application to other aspects of followership.

Case Presentations

Case one: Marty's case.

"I wanted what was best for Church Mutual (my company)!"

Summary narrative.

At the time of his exemplary act, Marty worked as Casualty Claims Supervisor for Church Mutual Insurance Company (CMIC). Church Mutual is a leading property and casualty insurance carrier for the religious institution niche in the United States. With a customer count of more than 74,000 in 2001 ("Church Mutual", n.d.), the 108-year-old Wisconsin-based company was well-positioned to take advantage of the impending hard insurance market, which would allow for considerable growth in premium volume and market share. However, in the competitive property and casualty insurance market, a major point of differentiation was a carrier's ability to provide prompt and efficient claim service for its customers. And, despite a customer-focused claim philosophy,

Church Mutual's claims department was inefficient and buried in paper in its normal operations. A conservative internal estimate indicated the claims department collected more than 1.3 million pieces of paper each year ("Church Mutual", n.d.). Placed in a single pile, the resulting stack would stand more than the length of a football field high at 130 yards. The sheer expense of the paper and the associated expenses for maintaining those records were the basis for a compelling business case for an internal project dubbed "e-File" for electronic files ("Church Mutual", n.d.).

With a mission value focus statement to "grow our corporate capabilities ...to meet the changing needs of our customers" ("Church Mutual", n.d.), the Vice President of Claims, Russ, and the Chief Information Officer & Vice President- Information Services of Church Mutual agreed to serve as project sponsors in early 2002. As owners of this project, they recognized a number of associated challenges in successful implementation of e-File. In addition to a variety of significant technical issues, numerous cultural issues also existed, including a department of approximately 100 employees who functioned solely with paper. As the sponsor of the business function, Russ chose Marty to serve as a project manager for e-File even though "he did not report directly to me". Serving in a capacity two layers below Russ in the company's hierarchy, Marty was selected for this important assignment based on his "strong people skills, ...(for being) open-minded" and his willingness to change, combined with a perceived ability to influence others to change. In addition, Marty had had previous success in working on automation-related projects for the department. Marty was thus charged with the "management of business owners, users, processes, procedures, and

policies” as well as to coordinate planning, secure resources, facilitate the project team, and to “work closely” with the project sponsors ("E-File charter", n.d.).

The goals of the e-File project were to “provide a positive experience for our customers, reduce claims adjustment expense, to improve efficiency, ... and to eliminate the paper intensive processes” (Heyne, n.d.) at Church Mutual. Characterized as a project with high risk for the organization, Marty began his work with a team on this significant budget item with an 18-month project plan.

The project leaders made an early decision to purchase specific software as the basis for e-File. Marty and key members of his information services team attended an off-site week-long training session. While each member of the team was expected to learn the software and get an early understanding of the implementation issues, Marty recalled the time as key in bonding as a core team. Once the team returned to Wisconsin, Marty worked with the group and the project leaders to build a project plan. The plan contemplated a variety of essential elements, including a formal and informal communication plan, the work in identifying all mail types, and strategies to design a model and supporting business processes. The iterative process included validation through prototyping and a model office phase where individuals completed actual work with the new tools. Marty’s team contemplated ergonomic issues, as well as working with the company’s training function to build a program to teach the new process and software to the balance of the claims department.

The result was a business environment that was 99.75 percent paperless, the recovery of hundreds of square feet of floor space, and the reduction of over \$100,000 in annual microfilming costs ("Church Mutual", n.d.). In addition, Church Mutual’s claims

department was able to service 13 percent more customers, issue payments significantly more quickly, and was essential in helping improve the company's customer retention ratio ("Church Mutual", n.d.). More importantly, when the affected employees were asked by Marty's team whether they wanted their paper back, the response was a resounding "no." Finally, the first phase of implementation took place at a cost of less than half the original bids to outsource e-File.

Following the completion of what was judged to be a highly successful project, the project leaders submitted e-File for consideration for an E-Fusion Award. The E-Fusion Awards, administered by A.M. Best, which is the primary rating organization for the property and casualty insurance industry, recognize "outstanding resourceful uses of Internet technology by insurance organizations" (Technology's", 2005, p. 35). Given his role and intimate knowledge of the details of the e-File project, Marty was tasked by Church Mutual to be the primary presenter at the 2005 E-Fusion Awards. As part of a field of six finalists, Church Mutual's e-File project was chosen as the winner of the Claims Management Award.

Motivations from the perspective of the subject and the peer/leader.

In reviewing the data gathered relative to this case, it becomes apparent that Marty had multiple motivations for completing his exemplary act of followership within the context of the e-File project. However, at the core of these various motivations was his passion for his organization and its purpose in insuring religious institutions across the country. Moreover, Marty also exhibited a strong drive in regard to his work on the e-File project from the standpoint of his department, which provided a key element of

customer service to the company's policyholders. All other motivations for Marty's exemplary act of followership in connection with the e-File project appeared to stem from this commitment to the organization and his department, and the related mission and function of each, respectively.

Over the top of the underlying motivation to serve the organization and help it fulfill its mission, the data suggested several other motivating forces are present for Marty as well. Further, it is also clear from the data that each of those identifiable motivations were not equally weighted. Marty's commitment to the organization and its purpose also appears further to have been stimulated by the prospect of working with like-minded individuals in a high-performing team to accomplish this important goal. The data indicated that he was involved in the initial brainstorming effort to choose core team members, but also bonded early with the core group and worked closely with other department members on the development, training, and roll-out of this important project. In serving as the project manager for e-File, Marty would work simultaneously as a follower to the project sponsor, but also as a leader for the members of the project team.

Finally, as the interview moved to a discussion regarding the relative importance of leadership, Marty talked about the depth of his personal feelings for Russ who was the project sponsor for e-File and his leader as the Vice President – Claims for Church Mutual. During this portion of our discussion, Marty demonstrated a strong genuine spontaneous display of emotion. It becomes clear from the data, that Marty's relationship with his leader was an important inspiration for his exemplary act of followership.

The following discussion examined Marty's range of motivations in this context. The subsequent section added depth to the analysis explicating further the relevant

findings to help in constructing meaning for the case. In addition, this dialogue examined the specific data unique to Marty's case, as well as reviewing other significant takeaways as perceived by the researcher.

Analysis and construction of meaning.

At the inception of the e-File project, Marty had been an employee of Church Mutual for approximately 14 years. Marty was a second-generation employee at the company having followed his father into the organization. Marty's father had achieved status at Church Mutual as both an officer of the company and the department head of the sales and marketing function. Thus, Marty was extremely familiar with the company, even by the time he joined the organization in 1988.

At the same time, Marty had established himself as a reliable and skilled employee at Church Mutual. As noted by his leader, Russ, Marty had a "strong desire to do a good job...and ... (was) ... an excellent people person." Moreover, Russ chose Marty as project manager for e-File based upon his previous success in working with technology projects, being "willing to change...and... (for his ability in) convincing other people to change." In addition, Marty's perceived understanding was that his leader had committed the department to completing this project as the first phase of a larger corporate effort.

For the claims department, the outcomes were seen by Marty as two-fold: an attempt to improve customer service and an effort to reduce expenses for the company. Essentially, Marty was recognized by his leader for his personal motivation to aid in fulfilling the mission of the company and in supporting his department. This motivation may be best exemplified by Marty's willingness to become the project manager even

after he was told by Russ that “it was gonna be a full-time responsibility and that we would not be backfilling or hiring staff to keep up with our other jobs.” In spite of the recognition that he would be putting in many more hours to complete the task, Marty willingly accepted the project manager role who, upon reflection, noted this project was “the right thing to do.”

Another strong motivation for Marty’s work appears to be the opportunity to work with other mission-driven employees in pursuit of a key company goal as a high-performing team. Marty’s level of connectedness to the team was expressed in a variety of ways throughout the course of our interview. Notably, Marty’s interview is replete with the words “we” and “us” in his discussion about how the team bonded and performed as a group during the project.

An example of Marty’s connection to the team is expressed with his description of how the core group formed as well as the process involving the extended work group. Marty described the thought process in early planning indicating, noting:

We knew that we would lean heavily on those people when it came time to, especially when it came time to train process to the staff. We also identified people we thought were strong with computers and ...asked if they’d be interested. And, then we also identified a couple of people that we knew would struggle, and brought them in. So, because, if we could prove that they could be successful, especially in the practice worlds, then anybody could do it. And we didn’t tell them necessarily that we chose them because we knew they were gonna struggle. We just wanted their...buy-in, because we knew we needed it.

That level of relatedness to the team was found further in the actual execution of the work where Marty talked about the early plans of the core team. “Once we understood how Content Manager (the new software) worked from a high level, we sat down and we identified every process in the claims department that existed.” Marty’s emphasis on his connection with teammates continues throughout the interview in a similar pattern.

Further, this connection to the group appears in Marty’s discussion of a bonding experience where the core team traveled off-site for a software training session. This learning workshop allowed Marty to form relationships with other unfamiliar company personnel. He recalled:

I tagged along and went through the (software training) class. We were expected to try and do all of the formatting, the high-level programming stuff they did. It was a very interesting experience, and ... what it did was ... allowed us to bond as a core team.

Marty further noted that the experience allowed him to develop relationships with others in the core group that he did not know particularly well, but demonstrated the short- and long-term connection he felt for team members:

There was this urge to still bond with everybody that was on the team. Bob ... and Jim (other team members) and I went out for a beer (one day after class). We were having a beer and ... Bob saw me get frustrated with my mug sticking to the ... napkin. He said, ‘Marty, just put some salt on that napkin.’ So he grabbed the salt shaker and he put the salt on the napkin and, my gosh, it melts the ice and the mug no longer sticks to your napkin. So to this day, you know, a couple of times a year, we’ll ...have... to pass the salt shaker as a joke. You know, so I mean it’s,

we formed relationships with each other that I, that I miss because I, I don't get to work with those people very often anymore.

Thus, the "we" factor and connectedness to the group who was pursuing this high-risk, but needed, task for the organization seemed to have been important for Marty.

Another significant inspiration for Marty was his personal connection to his leader. In discussing his feelings of his department leader, Marty explained that he had known Russ since he had been a boy. In the course of his career at Church Mutual, Russ had worked with Marty's father for several decades. The relationship between Marty's father and Russ ultimately became a friendship that extended beyond work and included the families of both individuals. As a result, Russ and Marty became familiar with each other over the years. Their relationship continued due to the connection between the families.

Later, as a young adult, Marty related that he "had gotten married, dropped out of school, and started working full-time" in a low-level clerical job in the claims department. Marty noted that from his position as department head, that "Russ saw me kind of flailing." Apparently, Russ pulled Marty aside one day and told him he was capable of doing more than this low-level job. Russ urged Marty to go back to college and made a promise that he would be offered a full-time professional position in the claims department after earning a degree. Over the ensuing two plus years, Marty commuted to a local college working toward his degree while also holding a part-time job at Church Mutual. And, true to his word, following graduation, Russ offered Marty the job as promised.

The level of commitment to his leader was evident as Marty discussed his feeling for Russ:

Russ is in my opinion a man of very high integrity. He's a family man. I feel very strongly about him because he pushed me to go back and get my degree. And, he stuck to his guns; he gave me a job.

Marty indicated "I am today, because of a lot of things he did for me." In fact, Marty went on to say that Russ was "one of the best people I've ever met." This portion of the interview was punctuated with a genuine display of observable emotion that confirmed Marty's depth of feeling for Russ. This motivation and commitment to his leader may be best characterized by Marty's statement that "Russ probably could have gotten me to go through a brick wall." In addition, Marty exclaimed, "There was no way I was gonna let him down! He invested too much in me as a person and as an employee for me to let him down. There was no way."

From Russ's perspective, it is evident that he has great respect for Marty's ability. For Russ, this was a project that had a large associated cost, but, if well-executed, would support his company's customer-oriented claims philosophy and control expenses. In addition, even though there was no direct reporting relationship between the two, Russ inserted himself into the project to provide support to Marty and the core group in this high-stakes effort. Finally, Russ was clearly pleased with the outcome of the e-File project, even before it was recognized by the outside entity. While he was confident in that positive outcome, Russ further conceded that the project would have been successful, but not as much so, had it been done without Marty's involvement.

Yet, despite the level of contact during the course of the project and their long-standing personal relationship, Russ was unable to explain any specific motivation on Marty's part for his exemplary act. Also, a close reading of Russ's interview transcript revealed no particular emotional attachment to Marty. In addition, Russ seemed totally unaware of Marty's regard for him. For me, this seemed somewhat surprising given Marty's depth of feeling for his leader. Thus, either that reciprocal feeling did not exist from Russ's viewpoint or he simply did not express his true mind-set during our interview. In any case, the net result was that the leader conceded that he "can't really explain" Marty's motivations for his exemplary act.

During the interview about the e-File project, Marty discussed a level of burn-out in the day-to-day role and frustration at not advancing in the organization. In many respects, while this personal motivation seems to be a lesser motivation for his work, Marty offered that the challenges associated with the project reinvigorated him as an employee. Over the course of the 18-month project, Marty indicated that he logged 1,300 hours in addition to his ongoing assignment. In describing his work with the team, Marty appeared to attain a level of personal engagement similar to what Csikszentmihalyi (1997) called "flow."

Marty noted that:

I remember getting here (work) at 6:00 or 7:00 in the morning, and trying to do a few things at ...(my)...desk, and then being in ...our conference room in our area before 8:00 in the morning. And, between meetings and working with the claims staff throughout the various issues and conducting all the brainstorming and whatever,...there were days that it was...in the middle of summer and the sun was

setting before we left. And, I don't recall being overly tired. That was something that was...I felt energized throughout almost the entire project.

Moreover, Marty discussed a feeling of separation anxiety at the conclusion of e-File.

Marty's feeling parallels the idea of flow, which has components including a clear set of objectives requiring suitable responses, immediate feedback, and when the challenges posed equal the skill level of the individual (Csikszentmihalyi). The outcomes of this high level of engagement are correlated with a distortion of time and allows for excellence in life (Csikszentmihalyi).

Marty's flow experience and level of commitment to his organization can also be seen in his discussion of the presentation at the E-Fusion Awards. In his presentation to the judging committee, Marty was coached to tell the story and indicated:

I told the story like, because it involved me. So, ... it was clear that I was in the story. I wasn't telling somebody else's story. I wasn't a narrator who had to challenge myself to put on a voice of whoever, because it was my voice. So, I told the story, and I maybe had something to do with it because it was the person who lived the story telling the story.

After Church Mutual was presented with the E-Fusion Award, Marty exclaimed, "I was doing cartwheels."

With his exposure for his role on this successful project, Marty was later offered advancement with more challenging full-time positions in the organization. Again, this outcome appeared to be a by-product of his work as opposed to a personal motivation for taking on the assigned role. Moreover, the relationships, he formed with team members, appear to have evolved into an extended internal network positioning Marty and his

organization for ongoing successful work. In many respects, such a network seemed to represent one segment of internal connective tissue in the organization that addressed problem-solving issues.

A final significant take away from this case is that Marty disagreed that he was a “follower” on the e-File project. In our conversations prior to the interview, the field notes reflected that Marty expressed concern over having such a label attached to him, much preferring the tag of “leader.” At the same time, the case reflected that Marty in fact operated simultaneously between his roles as follower to Russ, the project leader, while at the same time providing leadership to the core group. While Marty debated this point, the interview text seemed to address this issue to some extent. In referring to his relationship with his project sponsor, Marty stated that:

Russ gave me a lot of, he would have backed me on probably 99 percent of the decisions, but I’ve never been one to put my manager in harm’s way without ...discussing it first. If I, it wasn’t, he never really said, ‘Marty, you’ve got carte blanche to do whatever you’ve got to do. Just get the job done.’ That’s not the way it was. It was, ‘Marty, you know the direction, make sure it happens. If you think there’s gonna be a problem, just let me know.’ “

This interview segment also confirmed a large degree of trust by the leader in his project manager/follower who was charged to function in multiple roles in synchronously.

For Marty, a variety of motivations were at work in the exemplary act of followership. Building upon his motivation in the form of commitment to the organization’s purpose, Marty found inspiration in working with others in pursuit of a complex important corporate task, but also from his personal connection to his leader.

The by-product of Marty's exemplary act of followership was recognition and advancement in the organization.

Case two: Bill's case.

"To me, it was somebody pleading for their life. I mean ...when you start hearing that somebody is in dire need,... that's my motivation...to help somebody!"

Summary narrative.

After midnight on an early October morning, the alarm sounded at the main station of the fire house of a mid-size Wisconsin city. The call woke the previously sleeping firefighters alerting them to a house fire in the area with known victims still inside. In moments, the local fire response units were on the road. Before jumping onto this rig, Bill, a seven-year veteran of the department, grabbed a thermal imaging unit. On this night, Bill was tasked with the assignment of "heavy rescue," meaning that if needed he would be called upon to work with his captain to enter a burning building for the purpose of saving lives. Both Bill and his captain were backed by another two-person team assigned to save a firefighter if one were to go down during the rescue attempt.

In just over four minutes, the fire truck arrived at the scene to find fire and heavy black smoke, as well as a police unit who had escorted two people from the blaze ("Fire Report", 2005). However, the police also confirmed that a woman was still inside the burning house and needed to be rescued. With his thermal imaging camera and a Halligan bar in hand, Bill went to the front door of the home with his leader to get into position for their "heavy rescue" assignment. As they stood at the entry way into the structure, Bill's leader went to a different part of the building to assess the extent of the fire. Now, Bill

found himself alone, but he heard the screaming from a woman who was pleading for her life and trapped inside the burning building ("Fire Report). Without back-up, a hose line to suppress the fire, or a radio, Bill put his air mask on and waited for his captain, but saw him walking away from the scene. With "a million things going through my head," and after listening to the repeated cries for help, Bill felt he had no option but to enter the house alone in an attempt to rescue the woman.

Relying on the thermal imaging camera and his training, Bill entered the building after being told by a police officer that the lady he was trying to locate was confined to a bed and unable to walk. Knowing from experience that he would not be able to see his own hand in front of his face due to the dense smoke in the house, Bill crawled on the floor in an attempt to increase his ability to see and to avoid the tremendous heat from the fire as he tried to find the victim. From what he could see, Bill noted that the kitchen located to his right was engulfed in flames. As he slowly moved forward into the home, Bill also located and memorized potential alternate escape routes in the event his original entry way was blocked. Guided by the sound of the woman's voice, Bill could see the image of her head bobbing up and down through the hand-held camera. As he approached the woman, he also noticed "three or four" dead birds in a cage at her bedside. Bill knew instantly that the air quality in the room was poor and recognized that he had only moments to act. The victim, who Bill described as being a larger lady, told him she did not have the use of her legs.

With time being of the essence, Bill located the woman who was in a hospital bed, but struggled to drop the rails to provide him better access to the victim. Then, the 185-pound fire- fighter, who was wearing 75 to 100 pounds of gear, pulled the woman

out of the bed and lifted her off the floor as he began his retreat out of the burning house. As he attempted to retrace his steps moving backwards through the building, Bill became confused thinking he had taken a wrong turn. However, Bill quickly realized that the firefighters who arrived at the scene after him had closed his original entrance door. After searching for and finding the knob, Bill emerged from the doorway of the structure carrying the woman, much to the surprise of his comrades. The other firefighters quickly recognized what had occurred and assisted Bill in placing the woman onto a gurney and into the ambulance. The woman was transported to a local hospital where she was treated for smoke inhalation.

All told, Bill spent approximately three to four minutes in the burning building and had walked backward for 35 to 40 feet in rescuing the 300-pound woman. After gathering himself following the rescue, Bill rejoined the rest of the fire crew as they worked successfully to save the home. Notably, the woman that Bill risked his life for also survived.

In the aftermath of the fire, the police officers who were first on the scene and who had escorted two individuals from the house fire were cited by the local press for their efforts. However, aside from an initial “thank you” from the woman’s family and the congratulatory remarks from his crew, Bill received no formal recognition for his work. In fact, Bill noted that “upper management” at the fire department preferred to characterize the incident as an everyday occurrence in spite of his extraordinary act of courage. Later, after several years and through the determined efforts of a friend and fellow fire fighter, Bill’s work was ultimately recognized by his peers as he was inducted into the State of Wisconsin Police and Fire Hall of Fame.

Motivations from the perspective of the subject and the peer/leader.

An examination of this case revealed that Bill had a variety of straightforward motivations for his exemplary act of followership. The data suggested that Bill was a highly-focused, yet humble, individual who was proud of being a professional firefighter. Bill's work in general and specific to this particular act appeared to be a reflection of his personal values and a self-described "helping mentality." However, it is also clear that Bill's commitment to his organization was inter-connected with his personal motivations which provided the inspiration for his work. In this case, the organization served as a conduit for Bill to express his values and do his "job," while also enabling his association with other fire fighters who would appear to share those values and goals. The outcome of this connection gave Bill a sense of belonging to a larger team.

In addition, Bill talked about his personal goal for advancement in the organization's hierarchy. However, while he expressed a desire for promotions within the department, they were not directly related to the case and would seem to be a lesser motivation for Bill. In this context, Bill's life-saving actions did not appear to be a calculated effort to receive recognition as a pre-requisite for advancement.

Finally, the effect of leadership was not a motivating factor in Bill's case. Notably, the evidence suggested that this exploit took place in spite of the leadership of the organization. Following the incident, the leadership of the fire department distanced itself from Bill's exemplary act even when it was recognized by an external entity. This finding lent credence to the idea that followers do not necessarily need to rely on their leaders to be told what to do. Moreover, the implication was that leadership may be a

source of motivation for exemplary acts of followership, but are not necessarily a requirement for such activity.

Analysis and construction of meaning.

A close examination of potential motivations for this case revealed an intertwined connection between Bill's personal value system and the mission of his organization. In his interview, Bill indicated he was first drawn to become a firefighter noting that "being able to help people out really caught my interest." At the same time, Bill's fire department had a mission statement that read, in part, that the organization would "provide progressive emergency services ... (for the city)...in the most expeditious, yet safe and reliable manner possible" ("The LaCrosse", 2008, p. 4). Thus, it would appear that the fire department would be a natural place to employ those individuals motivated by a "helping mentality."

Bill explained his connection to the organization stating that "to me being a part of a fire department is ... (that)... you're part of a big family. You're part of a team ... and then the fact that you're helping other people and you're protecting the city." Bill's sense of team was reflected in his use of words like "we," "our," and "family" during his interview even though he was almost solely responsible for the outcome in this exemplary act. For example, this was evident in his remarks at his hall of fame induction ceremony as Bill "recognized all the people that went to that call and the fact we still saved that fire. Not only did we save this lady, but we saved this family's house."

The team connection was also demonstrated in the interview with Steve, Bill's peer observer. Steve described how he and other members of the department felt in watching Bill's induction into the Wisconsin Police and Fire Department Hall of Fame.

Even though he was not a witness to Bill's exemplary act, Steve felt that "everybody understands that it's a team thing and it's kind of an award for everyone, for the fire service really." In addition, Steve talked about his sense of pride in Bill's act noting that "it makes you feel real good about what you do. And, you don't always get to see ... outcomes that make you feel that way."

Bill's commitment to the organization and its purpose was evident in his ongoing preparation to perform his job. In addition to class work and maintaining licenses, Bill had led hazmat training classes for his department and regularly worked with his team in a variety of cross-training exercises. Most notably, since joining the department, Bill had been involved in combat training which simulated a life-saving effort in a fire. Bill's description of his act, which detailed how he surveyed the inside of the building and had planned his entry and several possible exit routes, was confirmation that he relied on this training. Bill explained further, "that (this) type of training helps out tremendously ... because it gets you in that mindset of how to actually get somebody out of a fire." Thus, in essence, Bill had prepared for years before actually performing his exemplary act.

In completing the act, Bill also felt that he had gained "respect" in the organization, as well as building a level of credibility with his fellow firefighters. Bill believed that the outcome of his exemplary act would provide his teammates with the ability to trust him in future dangerous situations. He also surmised that other firefighters would see him as a person that's "never gonna back out on me. Not that they had that feeling beforehand, but this definitely gives them a reason to trust." This individual level

of trust appeared to be important as Bill noted that the fire fighters have varying motives for joining the department:

Some guys just like the shiny red truck; they like the fact of being a fire fighter.

They like...the gear. But when it actually comes down to doing the job, some people, I'd say, ... just go in a different direction.

In many respects, it appeared that there was an important distinction for Bill between the idea of being a fire fighter and being a fire fighter.

Despite his deep connection to the organization and its purpose, Bill acknowledged that he did not know the specific mission statement of his fire department. Yet, by performing this exemplary act of followership, he appeared to be living the spirit of the organization. Steve, Bill's peer observer, said of Bill's act that "it was an example of what he's like. I wasn't surprised by it at all."

While Bill's commitment to the fire department seemed to be a core motivating factor for him, it was clear that leadership was a non-factor in inspiring this act. In fact, the data in this case supported the idea that Bill's exemplary act of followership took place despite his leadership. In describing the events leading up to this life-saving effort, Bill indicated that he and his captain were both assigned to heavy rescue. Proper protocol on this assignment was for both individuals to work together in any rescue attempt. Bill noted that "I get up to the front door with my captain, and the police officer meets us at the door. He says, 'There's somebody still inside. We can hear screaming. You need to get in there and save her.'" As they prepared to enter the burning house, Bill noted that "my captain left and he's got the radio ...which is one of the main things that you want." To Bill's amazement, he indicated that "all of a sudden, I'm all by myself ...and I see

him walking away from me.” Left to hear the cries of the woman begging for her life, Bill made the decision that he could not wait any longer and took the initiative to enter the burning building. “This is not a really safe situation for myself, because I’m going in there by myself.” In reflecting on this point in time, Bill recounted that entering the structure without his captain, “made me hesitate a little bit.” However, while “going in there by ... (himself) ... is probably not the smartest thing at all,” Bill also observed that “it’s one of those things where if I don’t do it, this lady probably wouldn’t be here today.” Moreover, in reflecting upon the actions of his leader, Bill stated the “I don’t know how to explain it.”

Following the act, Bill received the congratulations of his team for his work. Yet, the leadership of the department chose not to acknowledge Bill’s life-saving effort. Interestingly, the official report of the fire call provided a broad overview of what took place, including a notation that “two occupants (of the house) were assisted out by the police and the third was rescued by Heavy Rescue’s crew (“Fire Report”, 2005, p. 3).” This report made no reference to Bill’s sole entry into the structure.

The implication was that because Bill’s leader violated protocol for whatever reason, the department chose to distance itself from the entire event. While others in this department had previously been recognized by the Wisconsin Police and Firefighters Hall of Fame (Stotts, 2008), no application regarding this exploit was filed on Bill’s behalf by the leadership. Bill believed that “management didn’t want anything to do with it. They had the opportunity to, but they said they didn’t want it.” Steve, Bill’s peer observer concurred and noted further, that “any officer on his shift or the chief himself, as far as I’m concerned, should have made the nomination. You know, it was their shift. It was

their fire.” Ultimately, Steve, who was not at the scene of the fire, took on this mantle and nominated Bill on his own. And, after Bill was acknowledged by the hall of fame for this act, the leadership of the department chose not to attend the award ceremony. The net effect of the acts of leadership was a sense of broken trust from the standpoint of both Bill and Steve.

This interesting aspect of Bill’s case indicated that followers who understand their role and were connected to the purpose of the organization were capable of taking action on their own. Essentially, Bill’s act provided a compelling example that such followers do not need to be told what to do by their leaders to accomplish the purpose of the organization.

It is also important to note that Steve, Bill’s long-time friend and peer observer, was left only to speculate about Bill’s motivation for completing this exploit. While Steve can point to Bill’s various characteristics in describing him as a “solid person,” he was left to guess regarding Bill’s inspiration to place himself at risk by entering a burning house in an effort to save a person’s life. In many respects, given the nature of an act done largely by a single individual, all other observers would appear to be left guessing about the particular inspiration for the work. Nonetheless, Bill’s act inspired loyalty and trust with Steve. “As far as trusting in someone, that doesn’t happen too often and ... (Bill would)... be right up there.”

Another notable takeaway from Bill’s case is his description of the sense of “flow” that took place while he was performing his act (Csikszentmihalyi, 1997). However, while Bill was working to overcome a manageable challenge with a clear set of goals and was receiving instantaneous feedback, his entire experience lasted only

minutes. Nonetheless, even though Bill described a feeling of time distortion associated with the idea of flow, he indicated he felt time slow down for him as he was working in the home. “It seemed like I was in there (the house) forever, but it couldn’t have been that long.”

Finally, my field notes indicated that Bill had some level of discomfort in being associated with the term “follower.” However, as noted in his interview, it was clear from Bill’s description of the events that he was following the lead of his captain up until shortly before he was called upon to enter the building. The captain “was supposed to be the leader of that call. He was supposed to be the one that was gonna be the leader of the rescue,” according to Bill. However, as a follower, Bill was placed in the difficult position where he had to take control of the situation. Thus, even though Bill’s act might be classified by some as leadership, he was clearly working with given his understanding of the purpose of the organization and in the context of his role on the heavy rescue unit that fateful morning.

Case three: Mac’s case.

“I really enjoy the kids...you know, I really care about them. I care about them graduating. I care about them being good people and ...being as good as they can possibly be!”

Summary narrative.

On January 5, 2009, the University of Texas Longhorns football team completed a successful season with a last-second, 24-21, come from behind victory over the Ohio State Buckeyes in the Tostitos Fiesta Bowl (“Longhorns edge”, 2009). The Longhorns

had earned the right to play the 10th-ranked Buckeyes in this Bowl Championship Series (BCS) game after finishing their regular season with an 11-1 record ("2009 Fiesta", 2009). The only blemish on the University of Texas (UT) season was a late-game loss to conference rival Texas Tech in the ninth game of the year ("2008 Texas football", n.d.). However, while UT completed the 2008-09 season in a three-way conference tie with Texas Tech and the University of Oklahoma, the Longhorns were not invited to play in the national championship game ("2009 Fiesta"). Based on a complicated set of tie-breaking rules, conference rival Oklahoma was chosen for that honor. Ironically, UT had won its game with Oklahoma earlier in the season ("2008 Texas football"). Nonetheless, UT's success on the football field that year was enough to gain it entry into the coveted Bowl Championship Series. The Longhorns were one of only 12 teams out of 119 universities competing at the National Collegiate Athletic Association Division I level that had achieved that honor for the season. In addition to earning a large check for the athletic program by qualifying to play in the BCS, UT would also be able to parlay its success to recruiting new talent to the team in future seasons.

The University of Texas football program is one of the most successful and prestigious in the country with a total of four national championship trophies to its credit ("The Mac McWhorter", n.d.). And, while the team was inevitably disappointed by not winning a fifth national title at the conclusion of the 2008-09 campaign, the Longhorns' performance throughout the year allowed them to finish as high as a third-place ranking in the final national polls for the season ("2008 NCAA final", n.d.). In addition to the team's success, a number of players and coaches were also honored for their individual performances during the season. Within the context of coaching awards, one of the most

notable for UT was the American Football Coaches Association's (AFCA) recognition of Mac McWhorter as Assistant Coach of the Year ("AFCA announces", 2008).

McWhorter's official title was the Associate Head Coach and Offensive Line Coach for the University of Texas. Working in his seventh season on the UT coaching staff, McWhorter's offensive line was a key contributor to the success of the entire offensive unit and to the team overall accomplishments. From a statistical standpoint, the Longhorns offensive unit ranked fifth in the country in scoring, seventh in passing, and ninth in total offense during the 2008-09 football season ("McWhorter named", 2008). Such results on the offensive side of the ball were a primary contributing factor to the team's overall achievements.

Mack Brown, who was in his eleventh season as head coach at the University of Texas, has the distinction of having the best winning percentage at the school ("", n.d.). Both Brown and his offensive coordinator, Greg Davis, were instrumental in hiring McWhorter as offensive line coach in 2002. In fact, Brown nominated McWhorter for this prestigious award from the AFCA.

Founded in 1922, the AFCA is an association of football coaches with membership of more than 10,000 individuals around the world ("AFCA history", 2005). According to its constitution, the AFCA was formed to "maintain the highest possible standards in football and the coaching profession" ("AFCA history"). In 1997, the AFCA created the Assistant Coach of the Year Award "to honor assistant coaches who excel in community service, commitment to the student- athlete, on-field coaching success and AFCA professional organization involvement" ("AFCA history"). This award is presented annually to deserving assistant coaches in each of the five NCAA divisions and

the National Association of Intercollegiate Athletics (NAIA), which represents small schools ("AFCA history").

It was clear that McWhorter's credentials more than met the AFCA's guideline for the 2008 Assistant Coach of the Year award. While Mac has had his share of on-field success, he had also demonstrated a commitment to a number of charitable organizations. Mac had supported a local church ministry serving as the emcee for the charity's primary fundraiser. In addition, Mac had routinely volunteered his support to the Susan G. Komen Breast Cancer Foundation, a local domestic abuse shelter, and several other non-profit organizations. He also noted that he had donated time to football clinics helping teach youth coaches. Even though Mac had been highly involved in giving back to society, his interview reflected a decided passion for on-field coaching and a categorical personal commitment to his student-athletes.

With 35 years of coaching experience primarily at the Division One level, Mac began his career as a volunteer assistant at a local high school after graduating from the University of Georgia as a two-time Academic All-Southeastern Conference player ("McWhorter named", 2008). Given the nomadic life of a football coach, Mac had held a variety of positions at multiple schools since his career began. Passing on an opportunity in real estate, Mac chose to enter coaching and reflected that it "was not lucrative, but it was rewarding." After several seasons coaching high school football, including one year as a head coach at that level, Mac moved into the collegiate ranks joining the staff at Georgia Tech in 1980 where he handled a variety of assistant coaching duties before entering his ultimate area of specialization in working with the offensive line. After seven years at Georgia Tech, Mac accepted an assistant coaching position with the University

of Alabama, before taking the head coaching job at a Division II school, West Georgia College, for a single season. Mac moved back to the Division I level the following year working at Duke University in 1990, but returned to his alma mater, the University of Georgia from 1991-1995 where he coached the offensive line. Mac took assistant coaching position at Clemson University followed by a brief stay at the University of Memphis before returning to Georgia Tech in 2000. He completed the 2001 season at Georgia Tech as Interim Head Coach for a month and capped the year with a victory in the inaugural Seattle Bowl. After being passed over for the permanent head coaching position at Georgia Tech, Mac was hired by the University of Texas where he grew into his current role.

Over the years, Mac had had success as determined by various statistical measures as well as in developing and tutoring a number of players who have achieved at both the collegiate and professional level. And, while he has changed jobs a number of times, Mac proudly stated, "I have never been fired personally." The dynamics of Division I football involve a high rate of turnover for coaches in general. However, assistant coaches may also lose their jobs by being unable to handle the pressure of producing in their given role or in circumstances where the head coach of the team is fired or simply chooses to move to another position. Over the course of Mac's professional coaching life, he had been an assistant coach for all but two years and one month where he had served in a head coaching capacity. Given this context, and even though he disputed the idea, Mac could be classified as a career follower.

The significance of Mac's exemplary act of followership was largely seen in his cumulative work during the 2008-09 football season. Mac's relationship with the other

coaches at UT in building weekly game plans along with other duties, such as recruiting high school players to the school, were an important part of his on-field work and a successful season. However, within the context of his recognition by the AFCA and this unique case, Mac's passion was evident as he described his meticulous week-to-week preparation of his assigned players for game day.

That preparation typically begins on Sunday following the prior game with a breakdown of the game film and Mac's grading of each offensive lineman's work. Mac noted that after his individual work was done, the offensive coaching staff meets to review the game film together grading the unit as a group. Once that was completed, this offensive coaching staff meets with the head coach, Mack Brown, to discuss insights and updates on individual players. That session was generally followed by a review of the game film with the players, a light practice, and a team dinner. Following dinner, Mac begins his work to review the film of their upcoming opponent. Mac noted that his graduate assistant was charged with reviewing their opponent's previous four games and providing a breakdown of the film in various ways, including by position, as part of the base preparation for the week.

Mac begins Mondays at 5:30 a.m. for a "prep day" for the following Saturday game. That preparation starts with an individual review of the opponent's formations, stunts, and statistical tendencies. "I go back through it by formation ...and...get a feel" for how the other team operated. "We work off of total percentages,...what percentage they blitz,...this down and distance and ...so we get all those things broken down." Mac then worked collaboratively with the offensive staff to formulate the new game plan understanding the offensive line's role in that strategy.

Following his 14-hour Monday, Mac starts his Tuesday mornings early with individual preparation for each of the 18 players assigned to the offensive line. “I’m old school, because I give all my players ... (blocking sheet drawn) ...by hand (with) tips, reminders” for every game. In addition to his starting five players, Mac also prepared his second line along with the red shirt players who are ineligible to play “so they can start understanding.” Following a brief meeting to discuss the expectations for the week, the players have a two-hour practice session. After that session, Mac looks at the practice film and reviews individual plays to emphasize teaching points. Mac makes “a presentation film for my players that will have some of their game clips on it that I emphasize, plus our practice corrections so that I can (maximize our time together).” Wednesday’s schedule is largely a repeat of Tuesday’s work with a lighter practice session. Mac then comes into his office following that session on Wednesday to create his final tips and reminders for each player.

On Thursday, Mac also presents each member of the offensive line with a test and a final correction tape at a meeting before a brief point-after-touchdown (PAT) practice. The Thursday practice session is a “game rehearsal” where the players walk through the script for all planned situations. Mac noted that “by supertime Friday night, the test has to be turned in and what I call their video review sheet.” That sheet, accompanied by a DVD of the opponent’s four previous games, helps focus the players on specific aspects of their position and “helps them because they get a better feel for who they’re playing against.” Mac’s four-page test requires the players to know the opponents two deep line-up, favorite blitz packages, blocking schemes, and “everything that I think is pertinent to their success.” In addition, Mac insists each lineman learn the assignments of

all the offensive players. “If you have to make an adjustment (during a game), if you don’t know what his adjustment is beside you, . . . his assignment, . . . that’s hard for you to adjust. So, I make them learn it all.”

With five different positions on the offensive line, Mac’s goal was to make each player as “interchangeable as possible where they understand and know” the responsibilities of each position. This level of preparation has provided Mac and the offensive line with a higher level of flexibility given the potential for injuries during a game. Mac pointed to an example in a prior season where one player “actually started at all five spots during the year and played four of the five (positions) in the same ball game several times.”

Once the open-book test is turned in by his players, the test is graded. However, Mac takes the opportunity to review areas of confusion one final time. Aside from pre-game meetings, Mac’s week of 14 to 16-hour days for game day preparation is complete. Mac noted that “coaching is totally teaching.” In discussing the teaching mechanism, Mac indicated that:

to be able to install it on paper, on an overhead, show video of it, walk through it, then go out and do it, practice at full-speed, and then actually scrimmage it full-speed, in game day test conditions. . . I mean it’s probably the ultimate teaching tool!

In addition, Mac noted that his:

group, more than any other in football has to play as one. I can have four hitting on all cylinders and one screw up and it looks like the whole line is not worth a crap! And so, they all have to work together.

With all those preparations completed, Mac's favorite time of the week is game day. Mac described the feeling of entering the field prior to kick-off at a Longhorns' game:

Well, there's a great euphoria there...you walk out there and there's a 100,000 people and it's such a ringing in the ear, you can't even hear yourself think. And the intensity level is unbelievable and the concentration of the kids...It's a great reward ...to see it all come together on game day and watch the kids go out and play hard and strain. We've been so fortunate here to have our backs to the wall several times and then have to reach down and go win it late. I mean it's just a great feeling and, I tell you this though, the highs are never as high as the lows are low.

On the occasion of a Texas loss, Mac noted, that "you just hate it for the kids."

In winning the AFCA Assistant Coach of the Year award, Mac recognized it as "a great compliment to me, (but also) a great compliment to our program here at Texas. I don't think I would have won it if I hadn't been to Texas." Mac further explained that "I don't think I would have won it if I didn't have good players to coach, and I don't think you're any better than the other assistant coaches around you." Greg Davis, Mac's peer observer indicated that the AFCA makes this award "to someone that has been in the business a long time and for a long time has done things on and off the football field... (seen as) ...extremely high quality."

Even though Mac did not seek to win this award, it appeared that the AFCA acknowledgment of an outstanding assistant coach was recognition of exemplary acts of

followership. Also, while there was no discrete exploit, the unique aspect of this case was the outcome of a cumulative body of work performed by a follower.

Motivations from the perspective of the subject and the peer/leader.

An evaluation of the data from Mac's case points to a complex assortment of motivations for his exemplary act of followership. However, the basis for these multiple motivations centered on a man of honor with a strong connection to an organization that enabled him to keep a variety of personal commitments within his role.

It was clear that Mac McWhorter did not originally enter the coaching profession for the financial rewards. After passing on what he perceived to be a potentially lucrative career in real estate, Mac took a job at Duluth High School in Georgia as a summer volunteer to run the weight program. "I knew what that did for me as a player; back ...in 1974, weights weren't near as big as they are now." As an unpaid staff member, Mac reflected that "I probably put in more time voluntarily that year than I did last summer." At the same time, Mac's original motivation for taking this first step into coaching might be best summed up by his remark that, "I think I can make a difference in this football team."

After 35 years in a volatile profession marked by a series of job changes, Mac's original motivations in regard to making a difference seemed to remain in place. A primary motivation for his exemplary act was his loyalty to his current organization, the University of Texas. As Mac described the extent of his resume, it became clear that the very nature of the job of football coach was dependent upon the success of the organization, since failure essentially equated to an unstable environment for the coach.

Even individual coaching success at the assistant level appeared only to create eligibility for the next job at another school. At the time of our meeting, Mac had been (and remains) a member of the Longhorns' coaching staff with tenure equaling his longest stay at any other single institution during his career. Mac described the organization as "first-class," with "resources... (that)...are second to none." It was also apparent that Mac enjoyed the idea of working as a significant contributor in collaboration with other like-minded individuals to achieve the lofty annual objectives of the organization in the face of high-expectations from the various stakeholders and fans. In addition, the organization has helped create greater stability and built loyalty on the part of its assistant coaches in taking the unique step of naming a current assistant coach as the "head coach in waiting" following the retirement of Mack Brown.

That rare level of stability, provided by the University of Texas football program, had created a greater sense of loyalty on the part of the coaches and allowed Mac to honor other important commitments with taking care of his family being chief among them. Behind the nomadic life of the professional football coach was a family who remained at the same level of flux as the coach. In our dialogue, Mac described how his association with UT was integral in being able to take care of his family.

However, perhaps the most significant personal commitment for Mac was to his players. The sheer volume of text in our discussion, in comparison to all other motivations and commitments, demonstrated that Mac remained committed to helping his players achieve on the football field and by making a difference in their lives. My personal observation of Mac's interaction with his "kids" at the University of Texas facility before our interview validated a special bond. For Mac, such close connections

extended beyond the playing field and the players' time at UT. The success of his players remained a source of pride for Mac and served as an ongoing motivator for him.

The data also suggested that the effect of leadership was not a distinct motivator for Mac in his role. A review of the evidence indicated there was no doubt that the head coach, Mack Brown, was the leader of the football organization and that he had built a strong culture around the program. However, while it was clear that Mac acknowledged this and had the utmost respect for Coach Brown, leadership simply did not surface in terms of a primary motivating effect for Mac. At the same time, it was also difficult to separate Brown's role from the organization he had created.

Finally, Greg Davis who was Mac's long-time friend, professional colleague, and a peer observer, provided an excellent, on point, description of Mac's work habits and traits, as well as his commitment to the organization. In addition, Greg has had the opportunity to see how Mac had worked during an association that had transcended schools over 16 years. Yet, even though they had a close working relationship and Greg had many insights into Mac's approach to coaching and teaching, it appeared that Greg cannot precisely pinpoint the specific motivations for Mac as he went about his work.

Analysis and construction of meaning.

When asked what motivated him, Mac replied "success." In his world, Mac noted, that "success is winning and to win, you have to do your part and do it well, and (in my work of) coaching the offensive line, you control a big chunk of that." For a collegiate assistant football coach, however, success was an outcome of the organization that could not be attained on an individual level. The data from Mac's case indicated that he was

strongly motivated by the success of the University of Texas football program. Further, Mac's commitment to the organization served as an anchor point that allowed him to honor multiple other passions that motivated his work on an individual level. And, it was difficult to separate those commitments from each other as they are intricately connected.

Since joining the University of Texas football coaching staff in 2002, the team had posted an impressive winning record of 77-13, including earning a national championship trophy in 2005. While Mac has had individual success, as gauged by the statistical production of the offensive unit and the achievement of his linemen, he was clearly proud to be part of a successful organization. This idea was emphasized by Mac's use of the words "we," "us," and "our" in our interview as he described the team's weekly preparation and how the coaches approached their work as a group. For example, as he discussed the offensive team's preparation for a given week, Mac noted:

we have our base offense in, and some of it is core ...we ...run it all the time.

Some of it is fringe that we're gonna run against certain teams that match these looks...and we look at where we can get an advantage schematically, where we can get an advantage personnel-wise, and so we formulate our game plan based on what their breakdowns are.

Also, Mac used these terms as he explained his relationship to the other coaches on the team. In particular, Mac explained that "once ... we're in our meetings, we get in there, nobody bothers us."

Moreover, Mac repeatedly connected winning the 2008 AFCA Assistant Coach of the Year Award, an individual honor, to being associated with the UT organization. "I viewed (winning the award) as a great compliment to me, number one, (but also) a great

compliment to our program here at Texas. I don't think I would have won it if I hadn't been (at) Texas." Mac also talked about the award as being "a great compliment to my players." In his self-effacing manner, Mac also noted that he did not win the award "because of my phenomenal coaching ability," but that "a lot of other people ... were involved and contributed greatly." Mac's acknowledgement was a direct reference to the University of Texas football program and its various personnel.

Moreover, Mac made several references to his motivation to take care of his family, which he directly connected to his commitment to the University of Texas program. Over the course of his career, Mac held various positions with a number of organizations. His tenure at these institutions ranged from a single year at one school up to seven years at another before he finally took the position at UT. However, from a logistical standpoint, each job change either required Mac to uproot his family and move or Mac had to leave his family to relocate by himself to handle the position. For example, while Mac was at Clemson University, he and his family had "built the only house we've ever built." Several years into this position, the team's head coach was fired and Mac needed to find another job. With the prospect of relocating once again, Mac even contemplated leaving college coaching. Mac "sat the family down and told them the options," but his family convinced him to "stay in football." In taking a position with the University of Memphis, Mac made the move on his own while his family remained in Clemson "for three more years." And, Mac confided "that was a real tough time for me."

While Mac discussed how "success" in his work allowed him to provide for his family from a financial standpoint, it is also clear that the stability of his family may be more important to him. At Texas, Mac described the position he has held, and anticipated

retiring from, as “the best job I’ve ever had.” In large part, Mac commented that “there’s been some good stability” at UT and he intimated that the organization may be more family-oriented than others he had previously worked for. Given the volatile nature of college coaching, Mac’s work to make the University of Texas football program successful was directly linked to the stability of his family, which served as an overriding motivator for him.

Finally, perhaps the most powerful motivator for Mac, and one also directly connected to organizational success at UT, was his commitment to his players. In our three-hour plus interview, it became apparent that Mac felt a paramount, almost parental-like, responsibility for the student-athletes. While this responsibility included making each individual a better football player, it also incorporated making a positive difference in each of their lives as well, extending well beyond success in sports. By using his skills as teacher and coach, Mac appeared to be accomplishing this very personal mission, which served as both a source of pride and inspiration for him.

In addition, his players seemed to positively respond to Mac’s motivations exemplified by the desire to stay in touch with their coach long after their playing days were over:

I really enjoy the kids. You know, I really about care about them. I’ve been in it long enough now that they’re not just a pawn to win. I really care about them. I care about them graduating. I care about them being good people. It is really rewarding to me for my ex-players...I have a refrigerator at home... (and) ... they all send their pictures of their families and their kids and (my wife has) got them ...all over the refrigerator.

Greg Davis, Mac's peer observer, noted that it was "typical" for players to stay in touch with a coach after their career was over. However, Greg also noted that the "number of players that stay in touch with (Mac is) perhaps not typical," meaning that Mac seemed to have a higher than average number of such post-career relationships. According to Greg, "the number of players that call or stop by, e-mail is really a tribute to ... (Mac) ... and the bond he has formed when they played for him."

Mac explained that "you want them (the players) all to have a good experience, and I try to do that for them." However, with 18 linemen and only five starting positions, this remained a challenge for Mac:

You get real close to all those kids, (but) some of them aren't big factors with us, you know. And, here's where it gets ...tough..., because you love them all and you only play the best five and that's what I tell them all the time. 'The only thing that's fair now is what's fair to Texas. Because Texas is paying your scholarship, paying my salary, and we got to do what is best for the University of Texas on game day.'"

Mac noted further that he tried his "best to find a role for everybody." Philosophically, Mac indicated that each player has:

got to feel like they make a difference in the program, whatever that role is. And what I always tell them is everybody in this room has to play their role for us to be successful on Saturday. And some guy's role is a lot more glamorous. And, what I do remind them of is that you dictate your role, not me. So how they practice and perform dictates how much they're gonna play, or if they're gonna play.

Even though Mac felt an obligation to bring out the best in each player, he provided examples illustrating that this was not always possible. “I’ve had some guys that will break your heart, because they got all the talent in the world and for some reason, it (football) wasn’t important to them.” Still, Mac expressed a level of personal accountability for this situation noting, “it’s your responsibility to get them to that level and you feel like you failed, because you didn’t ...whatever the button was, you didn’t reach it.” In this regard, Mac talked about an instance of balancing between the role of the player and his feeling of responsibility. “I had one that was a third-team guy and I was trying to get him better...and he wasn’t very talented.” Mac continued to work with him and put the player in a game as he cleared the bench. Following the game, Mac invited the player to his office and told him, “I want you to watch this film.” As the player did, Mac commented that, “the kid was in tears.” Mac observed that:

it was more important to him to be a football player at Texas than to play football in Texas. And so, (the player) never ... was a big factor, but he had a role to play and... (he)... still stays in touch with me.

With the motivation to honor his personal commitment to his players, Mac appeared to be building new followers in the process. It was clear that he took pride in the number of successful former players he had coached that are now in the National Football League. However, Mac was also equally as proud of former players who had success off the field, including one who had won the Draddy Award, an honor which equated to the academic Heisman Trophy. Mac reflected about this personal motivation starting in the recruiting process and noted that, “you sit there and talk to their families and promise

them that you're gonna do everything you can to make sure they graduate and have a successful career and all."

The data from Mac's exemplary act also indicated that he worked almost simultaneously in the role of both a follower and a leader. In doing so, Mac provided ongoing leadership by outlining his expectations and those of the team while also experimenting with new teaching techniques to make each individual a better player. The impact of his authentic leadership was demonstrated by the relationships of his former players once they leave UT. At the same time, Mac also functioned well in the role of the follower as he worked toward success for his organization.

It was interesting to note however that Mac had great resistance to the term, "follower," being applied to him. As we talked about the subject of this inquiry in arranging for the interview, Mac staunchly stated that, "I am a leader." However, when our interview moved into the impact of leadership on his exemplary act, Mac acknowledged "that there's no doubt, he's (Coach Brown) is in charge." Mac further noted that his relationship with Brown is "as good as it can be with any head coach." Mac explained that while Brown was demanding, "he's easy to work for because he cares about you and the family."

A final notable takeaway in Mac's case concerned his feeling about the award he received from the AFCA. In our conversation, Mac acknowledged that this very prestigious individual award remained in a box at home. However, as we talked, my sense was that as he reflected on his accomplishment, he was somewhat in awe of what he had done noting:

It is tremendously flattering to know that I was picked as the best assistant coach ... (out of all) those coaches, because there's 119 (teams) times nine assistant coaches (on each team) and I know a ton of them and (there are) some excellent, excellent coaches out there.

Greg Davis, Mac's peer observer, stated that winning the award is "not only a tribute for the season, but ... also for the career that a coach had!"

Case four: Muriel's case.

"I felt it was an honor to be able to help people and to be a part of the whole response!"

Summary narrative.

It was a typical afternoon rush hour commute for most drivers that evening. However, shortly after 6:00 p.m. on Wednesday, August 1, 2007, the unthinkable took place on an eight-lane section of bridge spanning the Mississippi River in Minneapolis, Minnesota. According to the official National Transportation Safety Board (NTSB) report, "the I-35W highway bridge ... experienced a catastrophic failure in the main span of the deck truss" ("Collapse of", 2008, p. xiii). As a result of the deck truss collapse, "about 456 feet of the main span... (fell)...108 feet into the 15-foot-deep river" ("Collapse of", p. xiii). Of the 111 vehicles on that portion of the bridge at the time of the collapse, 17 were ultimately recovered from the water below ("Collapse of"). In total, 13 people died in the bridge collapse and an additional 145 individuals were injured ("Collapse of").

"At about 6:05 p.m., Minneapolis State Patrol dispatchers were notified of the accident by cell phone through the 911 system" ("Collapse of", 2008, p. 3). However,

even before the official response could take place, the authorities who arrived on the scene early “estimated that 100 citizens assisted in the total rescue effort” (“Collapse of”, p. 3). Those engaged in the rescue included construction workers, who had been working on the bridge, and a group of medical professionals, who were training at the Red Cross building, which was located immediately adjacent to the site. Of those individuals, the NTSB report indicated that 30-40 “went into the river to pull drivers and construction workers to safety” (“Collapse of”, p. 3). By 6:10 p.m., “a unified command post was established in the parking lot of the Red Cross building” to oversee the recovery effort (“Collapse of”, p. 3).

Shortly after the official recovery effort began, the cell phone of Vonnie Thomas rang on a local golf course alerting her to the disaster. A long-time Red Cross volunteer, Vonnie rushed immediately to her office in Minneapolis where she could literally view the scene of the accident. Vonnie, a Red Cross veteran with experience in many disaster recovery efforts, including work at the Pentagon after the 9/11 attacks, recalled arriving to “organized chaos.” In her role as Nurse Manager in Health Services for the local Red Cross chapter, Vonnie was charged with leading the assessment of the disaster from a health standpoint and planning for an appropriate response. A critical element of such a plan included marshalling the volunteer staff. After making a determination regarding the needed level of talent to do the work, Vonnie reached out to Muriel Olson as “the first one I called.”

Muriel, a nurse by profession, had been a Red Cross volunteer for more than 50 years. While she had been involved with this non-profit organization in a number of capacities, her role at the time of the I-35 bridge collapse was as part of Disaster Health

Services. A soft-spoken and humble woman, Muriel began her association with Red Cross in 1956 working at the Minnesota State Fair at the medical aid station, because it sounded “like fun.” Over the years, Muriel maintained her association with the organization as she raised her family and helped out as time allowed. However, she had been continuously involved with Red Cross since the early 1970’s. Upon reflection, Muriel related that she initially volunteered at the organization because it was “a worthy use of my time.”

Muriel first learned of the I-35 bridge collapse on the radio when she was preparing dinner that August evening. However, between a family commitment and by following Red Cross procedure, Muriel waited to be contacted by the organization to learn how she might help. Muriel related:

there’s a protocol that who’s ever in charge, probably one of the staff people, the dispatcher on call, and they would determine what type of response are we going to have to this and what kind of volunteers do we need.

By early next morning, Red Cross, in the form of Vonnie Thomas, was in touch requesting her assistance. However, as a volunteer of the organization and with existing obligations to her family, Muriel indicated that she was unable to respond immediately, but that she would do so the following day.

In less than 48 hours, Muriel joined the Red Cross bridge recovery response. “When I walked in (at the office), it felt like everything was in chaos, because there were a lot of people talking on the phone, using computers, and I didn’t know exactly who was doing what.” Muriel noted further, “I don’t think I was there for 30 minutes. I talked to Vonnie (her leader) and went around and ... told me who was doing what.” In her

defined role in Health Services, and as part of the larger effort, Muriel was tasked with working with volunteer nursing students who were trying to gather data on the victims of the bridge collapse. She noted:

We had a whole line of students on computers trying to find out where people were...how to get in contact with them. We had the names ... (of those) ...that were on the bridge. We contacted the hospitals to see who was there, if they would need any assistance from the Red Cross.

After working with the students on proper procedure, Muriel recalled, "I started calling people." Muriel's primary assignment was to contact the families of those who had died in the bridge collapse to determine the need for any resources that the Red Cross might provide.

In the process, Muriel also worked with the Health Services staff to gather information about all the victims who were taken to local hospitals. Even though the Red Cross had a "memo of understanding" with those area hospitals that addressed privacy concerns, Muriel noted that "not all the hospitals remembered that." In some cases, a representative of Red Cross had to visit the hospitals to reconfirm this arrangement, but that served to delay the assistance process. Ultimately, working with available information and in coordination with the local authorities on the confirmation of their findings, the Health Services unit moved to the next phase of the operation.

A significant portion of Muriel's assignment with the Health Services unit was to determine "what help the Red Cross could provide for" the victims of the disaster. Working within the guidelines of the non-profit organization, Muriel did home visits with a number of the families who had relatives who died in the collapse. "I didn't go to all of

them, but I went to several.” In her role, Muriel offered a variety of forms of assistance. “Some of them, if their insurance did not cover the cost of the burial, then we could help with some of the” cost. Muriel also noted, “we worked with families who needed help and all their family members were from out of town. They needed somebody to help with caring for their family member or their children. So we arranged transportation for them.” In addition, Muriel recalled that she “met with people (at the hospital) to find out what their needs might be.” For example, “some had lost their glasses and we could help with that.”

In some cases, the extent of Muriel’s volunteer role included making referrals to other disaster recovery units at Red Cross. For instance, if a family required housing as a result of the bridge collapse, Muriel referred them to the Client Services unit so they could provide needed assistance. Muriel also discussed an instance involving a woman who “happened to be looking out ... (her apartment)... window and saw (the bridge collapse).” Muriel indicated that this was just one example of how her unit responded to multiple referrals requiring mental health resources as part of the organization’s Stress Team, another essential aspect of the recovery response.

Since the Health Services unit was tasked to provide help to “everybody that’s involved in the event,” Muriel also used her nursing skills to assist the volunteer staff. In some cases, Muriel simply offered support to her fellow volunteers who were not feeling well, had difficulty handling the associated stress and required a blood pressure reading, or needed a referral to a doctor to handle potentially more serious health-related issues.

Each case file regarding a victim of the bridge collapse opened by Health Services was followed until conclusion. For some of the victims of the I-35 bridge collapse, help

was needed after the more obvious health related issues were resolved. For example, Muriel explained that after one patient was discharged from the hospital, the client's injuries made it difficult to access their house. Thus, Muriel authorized a payment for building an entry ramp into a home for the client.

As part of her role with the Red Cross, Muriel indicated that she is typically on call for a week about every four to six weeks. During the normal cycle, call volume and activity requiring a response varies. From time-to-time, a call can be managed over the phone while some weeks go without a single inquiry. However, Muriel explained that "sometimes, I'll put in a lot of hours." Such was the case with the bridge recovery collapse effort, which Muriel described as being "very intense." Since the disaster was "in our backyard,... I just made that commitment that I was gonna work that many hours a day, every day." All told, Muriel's work over the initial four weeks following the bridge collapse totaled well over that of a full-time position. "The first month, we were here almost every day."

Vonnie Thomas, Muriel's leader, noted that they have been "colleagues" for many years. According to Vonnie, she literally built the Health Services effort for the bridge collapse around Muriel's schedule. And, Vonnie noted that Muriel "knew exactly which time she could be there so I started a schedule by putting her down on those hours and then I knew who else to call." In discussing her thought process, Vonnie related that people:

want to talk to Muriel. They just kind of pour it all out and she can get all the information that we need in order for us to document it accurately so we can give them the help that they need.

According to Vonnie, Muriel's "assessment skills are just so excellent. Not only her physical assessment, but getting down to ... (what is really)...bothering the person. She can figure that out so well." In fact, while her role was "primarily working with the people who had persons who died" on the bridge, Vonnie broadened Muriel's assignment to include making hospital contacts with the injured as well, because she was "so good with people."

At the conclusion of each Health Services response, the leader is required to provide a performance appraisal of each volunteer's work. Vonnie noted that Muriel's work in the I-35 bridge collapse recovery was "above and beyond" expectations indicating further that "if I were ever in a shelter or even a disaster, I hope ... (Muriel is) ... the one that responds."

The typical non-profit organization has few resources to recognize the achievements of those people who volunteer their time. The Twin Cities Area Chapter of the American Red Cross was no different. In this case, the immensity of the recovery effort strained the organization's resources. As part of this effort, Red Cross volunteers provided "more than 4,900 meals and more than 15,000 snacks to families and first responders on the scene." In addition, "the chapter responded to more than 1,200 disaster welfare inquiries." To recognize the work of their volunteers, the Red Cross chose to honor them with the creation of a special pin signifying participation in the recovery effort. Muriel proudly wore that pin during our conversation. Also, in commemoration of the one-year anniversary of the bridge collapse, the Twin Cities Chapter also produced a retrospective video where members of the recovery team talked about various aspects of the massive effort. Muriel was chosen to participate in the video and reflected upon her exemplary act

of followership that, “I felt it was an honor to be able to help people and to be a part of the whole response!”

Motivations from the perspective of the subject and the peer/leader.

The data from Muriel’s case suggested that the motivations for her exemplary act of followership as part of the Red Cross effort on the I-35 bridge recovery were directly related to her deep connection with the non-profit organization. Essentially, this entity’s purpose and principles appear to mirror Muriel’s personal value system. Notably, Muriel’s commitment to the organization and its purpose was evidenced by multiple data points. In particular, Muriel had an association with the Red Cross that spanned more than 50 years. During that time, the organization provided her with a vehicle to demonstrate a helping mentality. In addition, the dialogue in my conversation with Muriel, in combination with the corroborating interview of her leader/peer observer, indicated that she was also motivated by the ongoing opportunities provided by Red Cross to collaborate with other like-minded individuals in performing meaningful work as part of a total team effort.

Another primary motivating factor for Muriel’s work was more personal in nature, but remained intertwined with fulfilling the organization’s goals. Specifically, the Red Cross provided Muriel with a mission-driven framework to use her God-given talents to relieve human suffering. Muriel channeled her skills and abilities as a professional nurse in an effort to give back to her community.

It was interesting to note that leadership did not appear to be a motivating factor for Muriel. In this case, the leadership of the Red Cross was of little consequence to

Muriel as long as she was able to do her work. The implication of this observation was that Muriel was effectively able to carry out her role almost separating herself from leadership. Moreover, while Muriel had a close association with her identified leader, Vonnie, in the I-35 bridge recovery effort, they were largely peers as there did not appear to be a great degree of ongoing hierarchical structure at the working level of the organization. As Vonnie noted in her interview, their roles could easily be reversed on future assignments with Muriel taking a leadership role for purposes of completing the work of the Health Services unit. Thus, even though there was a definite level of mutual respect between the two, Muriel was not personally motivated by Vonnie's leadership in this effort. Further, even though they have been friends for more than 20 years and Vonnie's observations of Muriel were accurate, Vonnie could only speculate about Muriel's motivations for performing her role on the bridge response.

Analysis and construction of meaning.

In reflecting about her reasons for first becoming involved as a volunteer with Red Cross, Muriel noted that "it was a way that I could use my skills." Then, Muriel completed her thought indicating "and it still is." As she talked about her motivation in volunteering with the organization, Muriel explained that, "I like to help people....God gave me some skills, so I like to use them." However, as Muriel discussed her role at Red Cross in relation to the disaster recovery effort, it became apparent her primary motivation was related to successfully fulfilling the purpose of the organization. Further, while other personal motivations surfaced in our conversation, each was inter-related to Muriel's paramount concern to help Red Cross achieve its goals.

In talking about her work on the I-35 bridge recovery effort, Muriel proudly stated, “I was a volunteer at the Red Cross and this was an event I could participate in and use my skills and I knew that they would need help to get the job done.” This declaration provided some interesting insights about Muriel’s motivations. In part, Muriel identified herself as being a part of the organization. The Red Cross served as a vehicle that would allow her to use her talents to express a helping mentality, but also provided Muriel with the ability to be part of a larger effort to achieve the organization’s mission.

Ironically, despite her five-decade long association with the Red Cross, Muriel admitted that she did not know the mission statement of the organization. Yet, upon close examination, Muriel’s work was a living example of the basis for the non-profit entity as well as the fundamental principles of the larger international organization. According to the Twin Cities Chapter 2007 Annual Report, Red Cross is a “humanitarian organization led by volunteers ... (charged to)... provide relief to victims of disasters and help people prevent, prepare for, and respond to emergencies” (“Connecting our”, 2008, p. 3). In addition, two of the fundamental principles of the international movement including “humanity” and “voluntary service” are clearly evident in this case (“Connecting our”). Simply by working with Red Cross, Muriel displayed her personal values which closely aligned with those of the larger organization. Muriel’s exemplary act of followership on the bridge recovery effort was an expression of those important shared values and was captured by her explanation that, “I just feel it’s a way of living out my Christian life.”

While fulfilling her personal motivations was important, working with other like-minded volunteers in accomplishing the purpose of the Red Cross was another important inspiration in Muriel’s case. This was evident as she described the organization

with the noticeable use of words like “we” and “team.” Muriel described the feeling of belongingness as she noted:

We’re part of the whole Red Cross Disaster Team...then, we have our own Health Services team and we have meetings once a month so we can get to know each other fairly well. And, that way, we can talk about what kind of a response have we, responses have we been asked to respond to, what have we done, what questions we have about it, what could we do better.

As she reflected about the bridge recovery effort, Muriel’s feeling of team was apparent in one specific example:

One family we met with at the mortuary. And ...Mike (a Red Cross associate) went with me. And we thought we would be there an hour, but we got there and the state representative was meeting with them. The Mexican press was meeting with them and so we just sat and waited until they were done.

Muriel continued:

And so then when they were finally ready to see us, then we all met with them with an interpreter because they spoke another language. And helped with what we could help with, with the cost of the funeral and did also give information regarding mental health resources. And then I followed up with the wife.

The larger sense of team that Muriel described was further corroborated by her peer/leader, and long-time volunteer, Vonnie. “Red Cross is your family during the disaster because you’re working together.” Vonnie added even greater depth to this feeling as she discussed the purposeful nature of this work. “You want to reach out and help people. And that’s about what it is. It’s a strong passion and it’s a family unto its

own.” Vonnie concluded the thought that also provided a sense of belonging to Red Cross volunteers as she succinctly noted, “We are a team. We are just...we work as a team.”

The team aspect also strongly permeated other elements of the case. In particular, in referencing the chapter’s accomplishment on the bridge collapse response, Muriel commented that “I’m amazed at all we did really.” This theme was evident as Muriel contemplated the enormity of “all the people that we were able to contact” and how “we were able to help” under difficult circumstances. Above it all, Muriel also observed that the team functioned well throughout this intense situation as she noted, “I would say people were easy to work with...good to work with. People supported each other.”

A final aspect of Muriel’s motivation to work collaboratively toward completing organizational goals was evident in the reward to those who participated in the Red Cross recovery effort. With limited resources, the non-profit entity chose to honor “all those who worked on the bridge response” by awarding each with a letter and a special commemorative I-35 pin. As we discussed the significance of the pin, Muriel pointed to it on the lanyard holding her name badge. In our conversation, I jokingly asked if she would be willing to sell it to me. Muriel, who was clearly proud of the pin, told me she would not part with the reward, because of its significance to her. For Muriel, the pin was a symbol that her contribution to the larger effort was of consequence and that she had been acknowledged by her organization as being a “part of the event.”

While Muriel’s case reflected the important element of team in accomplishing the organization’s goals, leadership was not an important motivation for her work. Aside from the day-to-day direction provided by her colleague, Vonnie, on the Health Services

unit, the leadership of the organization was a non-factor in her work. In fact, aside from the structure provided by the entity which allowed her to function, Muriel seemed to concentrate exclusively on the project mission. Muriel commented that “internally, there’s things going on that I don’t have to deal with,” a reference to funding issues at the chapter level. “The business end of it (Red Cross), I don’t worry about. I can come in and do my volunteer work and help people and not have to worry too much about what’s going on.” This observation suggested that, as a follower, Muriel had mentally separated the business aspect of the organization from the more purposeful work of Red Cross. As a well-educated volunteer, Muriel likely understood the need for proper organizational funding given the connection to providing resources in relation to her work. However, Muriel seemed to distance herself from financial and political elements of the business choosing to focus solely on helping others which was her original impetus for joining the organization.

Case five: Don’s case.

“You know, we did what we said we were going to do!”

Summary narrative.

In August 2008, the Marquette Interchange, a section of freeway in Southeastern Wisconsin opened three months ahead of schedule (Larson, 2008). While the timely completion of a public works project might be somewhat unusual, the Marquette Interchange distinguished itself as unique for a number of reasons. With a final budget of approximately \$810 million, it was the largest highway project completed in Wisconsin history (“Marquette interchange”, n.d.). The grand opening of the interchange in

downtown Milwaukee signified the end of a multi-year project that was not only completed under budget, but was also notable for how the community was invited to provide input into the design of the structure. The project was a reconstruction of a busy interchange in the highway system which carried almost 300,000 vehicles daily ("Marquette interchange"). In addition, the structure served as the gateway for three major interstate highways linking almost one-third of Wisconsin's freeway traffic to the balance of the country ("Marquette interchange"). Furthermore, this interchange served as an essential access point to the state from the greater Chicago area, which, in turn, was connected to a road system serving several important metropolitan centers in other regions of Wisconsin.

The new five-level interchange replaced a 1960's era, four-level system that was obsolete and required extensive renovation ("Marquette interchange", n.d.). Located in the heart of Milwaukee, the Marquette Interchange encompassed a staggering 21 miles of roadway, almost six miles of bridges, and the build-out of more than 180 structures (Larson, 2008; "Marquette interchange"). The interchange itself was comprised of thousands of tons of both steel and cubic yards of cement. Moreover, in addition to the relative magnitude of the undertaking, the project itself was also highly complex. During the four-year construction phase, the actual work was the highly coordinated effort of four independent construction firms. This complicated project required organizing the efforts of some 4,000 construction workers who logged more than 2.25 million work hours in building the interchange named for the famous university located near the structure (Larson). However, perhaps the most impressive statistic regarding the

Marquette Interchange was that there were no fatalities of any workers or motorists during the course of its construction (Larson).

After the Marquette Interchange opened, the project gained attention from several national organizations. The completed project was recognized by the American Association of State Highway & Transportation Officials with a regional award for on-time completion ("America's transportation", 2009). In addition, the Marquette Interchange was honored by the National Steel Bridge Alliance with a Merit Award for a long span bridge ("Marquette interchange", 2007). However, beyond the engineering awards from these recognized organizations, the Marquette Interchange project was also the recipient of the 2007 American Road and Transportation Builders Association for excellence in outreach to the community ("Marquette interchange", n.d.). Finally, the project was also a two-time winner of the Wisconsin Department of Transportation Golden Shovel award for contracting and mentoring disadvantaged business partners ("Marquette interchange", n.d.). This honor was in recognition of the project's commitment to businesses owned by minorities that had contributed approximately one-fifth of the manpower in the construction phase (Larson, 2008). The ultimate result of the Marquette Interchange project was an acknowledged process and outcome that was studied as the model for other states to emulate for similar construction projects (Larson).

While there was no doubt that the Marquette Interchange project was a success from any number of different perspectives, the work on this important part of the Wisconsin highway system started years before the first shovel of dirt was turned. And, as a major public works project, the Marquette Interchange was affected by a significant amount of politics.

Interestingly, Don, the individual who would ultimately be charged to serve as project manager of the Marquette Interchange, was one of the original state-employed civil engineers who signaled the need to take action to reconstruct this important portion of highway. Since the original structure had been “opened to traffic” in 1968, the area it served had grown considerably. According to Frank Busalacchi, Secretary, Wisconsin Department of Transportation, the interchange had been designed “to hold about 150,000 vehicles per day,” but was being used by double that amount on a daily basis” (“Marquette interchange”, n.d., para. 2). Thus, this portion of local Milwaukee highway system was subject to frequent traffic congestion and back-ups. Furthermore, maintenance costs for upkeep on this segment of road had grown considerably more expensive over the years. The heavy use of the highway, in combination with those growing maintenance issues, caused concern for engineers about potential safety issues. By the late 1990’s, Don noted that “we had to start a study (of this area of road), because we needed to ...start replacing ... (the interchange) ...because the bridges were going to be posted for ‘no trucks.’” With the threat that this major access point to Wisconsin might be closed to commerce, Don indicated that things “got serious” at the state level.

Given that the nature of the project would involve the replacement of a major interchange, federal funds were required to complete the work. Don began working with representatives of the federal government along with several organizations at the state level regarding the first steps toward the reconstruction project. “That’s when we started the environmental impact study,” according to Don. With a projected initial cost, which “we estimated ... at \$1.4 billion,” various departments of the state and federal government became involved on the proposed mega-project.

In addition, the proposition of reconstructing this key interchange drew strong reaction from many important stakeholders. According to Don, the mayor of Milwaukee weighed in indicating he did not want the freeway and he “attacked our study.” Also, there was a fear by many interested observers in Wisconsin that the cost for replacing the interchange would drain resources taking “transportation dollars out of the whole state (budget), and then none of the projects get built around the state.” Finally, there were challenges associated with interested parties who believed that a new structure would negatively impact adjoining neighborhoods as well as the business community who “thought that we were going to close the freeway for 12 years” and “Milwaukee’s closed for business” during that time.

In the midst of the controversy, Don initially turned down the request from his leadership who asked him to serve as the project manager for the reconstruction effort. “Why do I want to do that? You know, I was getting ready to retire.” According to Don, the Marquette Interchange was “a project of national significance. Very complex because of all the bridges, because it’s right in downtown Milwaukee.” The reconstruction was “condensed into a small area because of all of the buildings ... in the area. So it was a very difficult project.” Don further explained the intricacy of the work. “You got all these different parameters that are in there. I mean, we got real estate issues. We got hazmat issues. You got the public.” However, at age 57, when most Department of Transportation (DOT) engineers start thinking about retirement, Don accepted the challenge associated with this high profile assignment.

In 1964, after graduating from Marquette University with a civil engineering degree in hand, Don joined the Wisconsin Department of Transportation. As he reflected

on experience with the DOT, Don noted that “it’s been a good career,” but “it’s had its ups and downs.” As a state employee, Don noted that his compensation was not competitive with the private sector and that he had had several opportunities to move into more lucrative consulting work over the years. However, those opportunities came to him “at the wrong time” in his life. During his tenure, Don chose instead to expand his capabilities by volunteering for specific assignments within the DOT which ultimately led him to other internal opportunities. In addition to making professional choices to provide stability for his family, Don also noted that even though the consultants he worked with did the design work for freeways, “we did all the construction here. And that’s what I did. I loved it. And, you really couldn’t work for a consultant to do ... construction.” As he grew in his career, Don was tasked with work on increasingly complex construction projects that ultimately prepared him for his assignment on the Marquette Interchange project.

From 1999 through 2004, Don led his staff through a project plan in anticipation of beginning the construction phase of the work which did not start until 2005. The complex plan had a number of essential elements including obtaining the necessary sign-offs from the appropriate federal government agencies to secure the needed funding. In addition, Don’s team also had to gain internal agreement with various levels of leadership at the state level, including approval from the Secretary of Transportation and the Governor. After working through the approval process, the next major aspect of the project was the design and engineering stage. A “request for proposal” process was initiated and follow-up interviews were conducted in an effort to select the best qualified

design consultants for each individual aspect of the interchange. At that point, the initial project plans began to develop. Don recalled that given the scope of the project:

We co-located the consultant staff and my DOT staff in an office building downtown and we actually had an office there with federal highways (staff) too. So then we had all the designers, because we had 15, 16 different consulting firms under contract to work on this. We had one prime consultant and then the other 15 were sub-consultants. Well, we got all these people together in one building with my DOT staff that's doing the oversight and federal highways, so now you've got a Marquette Interchange team. And everybody could work together.

Don pointed out that had the design work on this complex undertaking been done independently and “then try to meld this thing together,... (the outcome)... would have been a mess.”

Don formed a team comprised of three supervisors who were responsible for different portions of the project including design, technical background, and finance. This oversight group was formed in part to manage potential scope creep, “because engineers always like to build a better mouse trap.” Philosophically, Don stated that “we learned early on... (that) ... the owner has to be in charge of the project.” Without this level of management, Don explained that “you wouldn't have any idea of what it would cost or when it would get done.”

“We also talked about public outreach.” With the relative placement of the proposed Marquette Interchange in downtown Milwaukee, the team recognized that a number of stakeholder groups would be affected in the construction phase. Don indicated, “You get all the community people involved. You go out and you talk of what you're

gonna build. You get their input and then as you design the project, go back and show them where you are.” In the case of this work, Don’s team acknowledged that “this project reaches all neighborhoods of Milwaukee, because it’s so centrally located.” The DOT staff met with representatives from various ethnic communities located adjacent to the structure including printing needed explanatory literature in different languages. “We met with Marquette University ...and ...the downtown business group.” Don recalled that the business group was “the most outspoken, because obviously there was a big financial impact there.” Using a systematic approach to make contact with all the interested parties, “we took outreach to a whole new level” speaking to service groups, elected officials, and others constituents that might have a concern. To manage the flow of communication, “we were just willing to talk to anybody at any time, and we did just that.” And, according to Don, “we never did that before.”

During this outreach process, the team gathered information from the various groups and responded with alternatives to the design of the structure to meet perceived needs. For example, in working with the business group, the design team developed drawings with alternative access points to the highway. “You have to sell your design concepts, because you know as a traffic engineer what will work,” noted Don. “And every time you put in a ramp, and we did put in some ramps that we didn’t want to put in, ... we just bit the bullet. This is how you get consensus on a project.” Don reflected that, “because we got people so engaged, ... we ended up probably with a better design.”

A final element of the project outreach included a concept called community sensitive design ("Marquette interchange", n.d.). “We brought in elected officials, citizens, and business groups to come up with what we could do to make the interchange

look better,” according to Don. The consultants were tasked to provide various design features such as different fencing, light poles, colors, and railings. Such design elements included art customized to each area of the project.

After working through the outreach program and developing a final design for the project, Don’s team prepared for the construction phase. Due to the size and scope of the proposed structure, the team took the unusual approach of having a formal pre-bid meeting with the interested construction firms to explain the design “because we wanted to make sure they understood the complexity of it.” Don explained, it “was something we never did before,” but attending this meeting was a requirement to submit a bid. Also, while the project was marketed nationally, it caught the eye of three Wisconsin-based firms. However, the magnitude of the structure made it financially prohibitive for any one of these companies to accept the work. Thus, the three entities formed a special joint venture that allowed them to meet the minimum bidding requirements of the project. Ultimately, a total of four construction firms were selected to build the Marquette Interchange (Larson, 2008).

To manage the construction phase of the structure, Don said that “we hired a consultant to oversee” the engineering of the various portions of the build-out, as well as to work with the project managers that were at each worksite. Don indicated he “struggled” with the coordination of the work. However, the expanded group held “weekly meetings where these project managers would meet with each other, discuss issues, and we moved on together.” Don explained further that “these individuals had to be one and think alike” to keep everyone working together.

Over the nine years during his exemplary act of followership in working toward completion of the Marquette Interchange, Don indicated a sense of self-satisfaction with the outcome. Many of those who had originally fought the process and Don during the outreach and design portions of the project later approached him with thanks in recognition of his significant contribution to the local area. In meeting the challenges of managing a project that was clearly the largest he had ever done, Don also conveyed a sense of pride in the result and what had been accomplished by his team. “We learned too, so we kind of grew with it.”

Motivations from the perspective of the subject and the peer/leader.

A review of the data from Don’s case indicated that there were several motivations at work during his exemplary act of followership. However, the evidence strongly suggested that the primary motivation for Don’s work on this extensive project was tied directly to the successful completion of organizational objectives for his employer, identified as the Wisconsin Department of Transportation. Notably, Don’s discussion of this project indicated that he used the opportunity to give back to his organization while completing this important work.

The interview transcripts and my personal observation of Don confirmed that he had a strong personality. At the inception of the project, Don was 57 years old and was contemplating retirement. Yet, he demonstrated a willingness to take on the challenge of the Marquette Interchange project on behalf of his organization. In many respects, the evidence seemed to point to the fact that Don had little personal motivation in accepting this assignment. While he had been offered an uncharacteristic financial incentive from

the state-run entity, Don did not appear to be motivated by money based on his willingness to remain a career employee of the DOT despite other potential opportunities. However, the data also suggested that as he progressed in working through the Marquette Interchange project, Don grew in confidence and was inspired to assert himself to another dimension of personal growth. This idea was reflected in Don's continuous references to his use of novel solutions on issues as they arose during the course of the project as well as his actions to challenge other younger employees to aspire to a higher level of professionalism. This personal growth emanated directly from the outcomes associated with this challenging and complex project.

Also, even though he accepted the project manager role at the request of his supervisor at the time, leadership did not appear to be a motivational driver for Don. Moreover, as the project unfolded, there was a decidedly political element that was unique to this case. Throughout the course of the Marquette Interchange project, several significant leadership changes took place in both the DOT, Don's department, and in the executive leadership of the state. These organizational changes had the potential to disrupt the continuity of the project work and, as the details of the case suggest, the political elements in play during the nine-year time project negatively affected the otherwise noteworthy outcome of the Marquette Interchange project with costly delays and lack of support.

On a related point, Gary, Don's peer observer, was unable to discern the specific motivations of the research subject for his exemplary act. At best, Gary was only able to speculate regarding the particular inspirations of Don, an individual he had known for at least 20 years.

Analysis and construction of meaning.

The evidence from this case suggested that Don's exemplary act of followership was inspired by a variety of different motivations. However, a distinguishing feature of this case was the presence of a political component that made it unique. As noted in the summary narrative of the case, Don was a long-term employee of Wisconsin's Department of Transportation (DOT), which was "one of the largest state agencies with over 3,300 employees and dozens of satellite offices" ("Wisconsin Department", n.d., para. 2). With a departmental budget of nearly \$3 billion, one of the primary functions of the DOT was to "support all modes of transportation, including state highways" ("Wisconsin Department", para. 2). The DOT was one of a multitude of state agencies and departments with varying interests and constituencies all vying for resources under the leadership of an elected leader, i.e. the Governor. In addition, the Secretary of the Department of Transportation was a leadership position appointed by the Governor. Conversely, Don was not an elected official, but a long-term engineering professional working for the state and charged with the timely development and construction of the Marquette Interchange.

Given that background, the evidence from the case suggested that leadership was not a source of motivation for Don in completing his exemplary act. Moreover, there were several details from the case that suggested leadership may have actually impeded the progress of this nationally-recognized construction project.

In this case, it was important to separate the specific leaders from the actual positions they occupied. There was nothing in the case data that would suggest any lack of competency on the part of any of the elected or appointed state leaders associated with

the Marquette Interchange project. However, the evidence from the case did suggest a lack of continuity in leadership over the duration of the project based on political factors as well as a potential lack of goal alignment between the governor's office and with Don in his role as project manager in the DOT.

Starting with the initial environmental studies on this project, which began in 1999 through the opening of the structure in 2008, Don indicated that he had "been through three governors and five secretaries." Don noted that while there is a political element on the typical construction project, the scrutiny of that work rarely gets to the level of the project engineer. However, with the Marquette Interchange project, Don explained, "You know politics is always above. But with this, because of the scope of the project, it just hit it straight on, because you're looking for so much money." Also, with the construction site located in the heart of Milwaukee, Wisconsin's largest city, Don noted that there was a sense from local stakeholders that "it's gonna take us 12 years ... (before the project was completed)...so Milwaukee's closed for business for 12 years." Those economic concerns, in combination with the mayor's expressed doubts about the interchange project as a whole, placed additional pressure on the affected state leaders. In fact, following the election of the third governor under Don's tenure during the project, there was also a change in political parties. At that point in the design phase, Don stated that the new governor "wanted to take a fresh look at things. We had to meet with his advisors quite a bit and then that kind of just delayed the project a year." According to Don, the inquiry was parallel to that of the mayor and "we were answering the same questions again." In order to satisfy the needs of leadership, the DOT had to "redo our estimates and shape it, cut the project down some more." The delays associated with this

additional work “cost us \$20 million in inflation.” Gary, Don’s peer observer, and a professional engineer who also was involved in the project, confirmed the frustrations relative to the delays on the design of the structure and changes in scope associated with this political changing of the guard.

In retrospect, Don confided that near the end of the construction phase, he learned that when the third governor took over, his administration had express political concerns over the Marquette Interchange thinking “that his project would be a black mark.” Don later came to understand and appreciate the support he received from his Secretary who was a skilled veteran of high-profile construction projects and committed to the Marquette Interchange. Thus, while leadership ultimately sanctioned the project, the lack of continuity throughout the duration of the development and the delays associated in completing the structure did not serve as a motivating force for Don in his work.

The data from this case clearly indicated that Don was an exemplary follower, given the many leaders at the various levels of state government. However, the case also demonstrated that Don served in a simultaneous leadership capacity as well. When asked who he considered his leader on the Marquette Interchange project, Don plainly stated that, “I always felt I was.” The project was “given to me by the first secretary. And then the second...some of the secretaries I would just kind of report what was happening.” Later, when Secretary Busalacchi became more active in the project, Don reported to him, but noted that “generally, a person of my classification doesn’t report directly to the Secretary.” Nonetheless, during the course of the project Don worked with a broad oversight committee designed to “keep the Secretary and other division administrators and everybody informed.” The hierarchy was developed to provide guidance “if we had a

million dollar decision.” As the project unfolded, Don indicated, “we had a couple of things that cost a million dollars that we wanted to talk about.” Don noted that on several such occasions, he went to the committee indicating a specific course of action and “they usually did it.” Gary, another civil engineer and Don’s peer observer during the project, described him as being direct and a person who made decisions. “He listened to people, seeks advice, but there’s no doubt ... (he was)...in charge of the project.” At the same time, Gary also noted that the leadership of the department “learned to trust ... (Don) ...and to value his contribution and his suggestions.”

Even though Don resisted the idea that he was a “follower” on this project, the case also demonstrated his willingness to take ownership of the project. In this situation, Don was directly motivated by his commitment to the organization, the Wisconsin Department of Transportation, and its purpose. At the conception of the Marquette Interchange, Don had been an employee of this organization for 35 years and considering retirement. During his tenure, Don conceded that he had multiple opportunities to leave the state agency for more lucrative work. However, Don’s discussion of his decision to stay at the DOT as well as his search for internal opportunities for personal growth seemed to indicate a genuine love for his organization. Having prepared himself through increasingly challenging work experiences equipped him to accept the challenge of working on this “once in a lifetime” project on behalf of his organization.

The evidence of Don’s allegiance to the DOT was manifested at several levels, but most notably in his interview transcripts which were replete with his use of the words “we” and “team” as he described the work of the organization throughout the various phases of the nine-year project. In addition to Don’s various descriptions of the work

using the concept of “we” already noted above, several other examples provide further support for this idea.

During the community outreach phase, Don referred to a variety of strategies used in this effort as he noted:

We had a public information officer on my team that worked with ... the consultant just managing the outreach. And then we ... would put them on a mailing list. And we had an e-mail list. We kept track of everybody and as we got information, we would send out periodic newsletters, so all this information could go out. Everybody knew where they could contact us.

During one portion of the construction phase, Don also related a story about removing a section of the prior structure to make way for a portion of new construction:

We always took pride in ... (reaching)... another hurdle. The first night that we took down a bridge, people said, ‘Nah, you’ll never get it out of there.’ You know, we took the whole bridge out and opened the whole freeway in the morning and the bridge was gone. And that was quite an accomplishment. Now, I didn’t physically do it, but that was in our plans.

The team aspect of the favorable result for the department was clearly seen in Don’s pride with the outcome and his perception of the positive effect upon his organization. In Don’s view:

People feared the Department of Transportation because you’re always closing roads and disrupting the public. Well, now that the project has been such a success...there’s like a smiley face on the department. You could go anywhere ...

(in the area)...and people welcome you. You know they know you can do what you say you're gonna do. There's a trust in the department!

For Don, he had honored his personal commitment to the organization through his meaningful contribution to the completion of the Marquette Interchange project. "The department is much more respected just because of the success of this project."

In addition to a direct component of organizational success, Don appeared to use opportunities presented by the project to indirectly strengthen the future of his department. For example, Don indicated the team "built up a lot of pride and ownership in it because a lot of the decisions in the project were mine." However, during the construction portion of the project, Don chose not to wear the hard hat on site minimizing his presence during the build out. Instead, Don used the project as a tool to assist with increasing the personal capabilities of each of his project engineers. "I gave them certain amounts of responsibility," but also noted to each that he would be available to help on any issues they could not solve. Don commented proudly:

And you know what, I didn't have any issue come to me. You get the right people in there and they take pride in what they want to do. If I would have been there looking over their shoulders, then everything would have been coming to me. And then I'm out there alone. Then the project's too big for one guy.

Gary, Don's peer observer, further supported this idea as he confirmed Don's "conscious decision to let the people that reported to him handle and make decisions regarding the actual construction." Don indicated that these team members "appreciated being able to show that they can do it and then they grew." For Don, this strategy for strengthening his

staff also addressed his concern for the future of his organization, “because who’s gonna do it after I retire?”

Intertwined with Don’s motivation to help his organization accomplish its purpose was an internal source of personal inspiration. Even though Don was a highly experienced engineer, the Marquette Interchange project was by far the largest he had ever been involved with. “I had big project experience, but still nothing like this.” Don conceded that the scope of the project was “kind of scary.” However, the challenges associated with this mega-project combined with his body of experience provided Don with the confidence to attempt novel solutions to the unfamiliar problems associated with this work. The impetus for Don’s willingness to take such calculated risks appeared to be on behalf of his organization’s success. “There were so many things that we were doing. You know, we were trying different things. We would come up with ideas and we would do it. Things we didn’t do before.” Yet, the outcomes of these new ideas also seemed to provide him with a growing personal motivation that did not necessarily exist when the project began.

Moreover, my observation was that Don was personally motivated to keep the commitments he had made to the various constituencies during the community outreach portion of the project. He had worked for an extended period of time working with various interest groups in an effort to gain consensus. And to a large degree, keeping that trust was a matter of personal honor for Don as the construction phase was completed. This was evident in Don’s commentary about the outcome of the project where he noted:

We did what we said we were gonna do. In fact, we even put together a slide, pictures to show what we promised at public information meetings what it would

look like and we showed ... the same pictures ... (of)...exactly what we built.

The same thing! So we built up a lot of trust.

At the same time, while he was later personally recognized by various engineering groups for his role in the project, Don's work was not overtly motivated by the desire to win awards. In fact, the evidence suggested that Don was energized by the process and, ultimately, was in amazement of what had been accomplished by the team effort. Moreover, Don seemed to have difficulty comprehending the impact of the project on the local area. Don reflected that, "you get so busy doing your job and then every so often I would stand back or somebody would say something to me at a party, and then I'd really be in awe ofwhat we were accomplishing." Don further related that a friend had seen a personal award displayed at his home. Don told his friend, "I can't believe ...I got an award for doing my job" to which the friend replied that "they don't give awards like this for just doing your job."

The completed Marquette Interchange changed the Milwaukee skyline for generations to come. And, the positive outcomes of the project, which had a planned life of 75 years, were directly associated with Don's exemplary act of followership (Larson, 2008).

Cross Case Analysis

In this portion of the analysis, I will discuss the strong themes that emerged from the five cases studied in this research inquiry. This discourse begins with a description of the methodology used to complete the cross analysis. Following the explanation of this work, I will then review the demographics of the actors in the quintain of cases. Finally,

I will identify the themes that emerged from the cases along with a discussion of those findings and provide my assessment of the importance of those patterns along with making connections to other supporting work. Within that discussion, I will, on occasion, use the masculine reference, e.g. “he, him,” etc., in describing assertions in an effort to preserve the anonymity of each participant.

My final chapter will then be dedicated to a discussion of the resultant meaning that arose from the findings. I will then conclude this dialogue with recommendations for practice as well as a call for additional research to advance the field of study of followership. I will also note the delimitations and limitations of this study.

Cross case methodology.

A simple and straightforward approach was used to develop the themes across the quintain of cases studied in this inquiry. The specific method involved “two stages of analysis – the within case analysis and the cross-case analysis” (Merriam, 1998, p. 194). As noted above, a within case analysis was completed by reviewing the data from each individual case and outlining themes and patterns from the data. A narrative for each case was developed supported by quotes from each of the subjects and triangulated by data taken from the interviews of the respective leaders and per observer as well as related documents. The internal validity of the findings was enhanced through member checks offered to each subject who reacted to the findings with comments and questions.

The second phase of the analysis, i.e. the cross case analysis, began with a review of each case within the context of each other in an attempt to find initial patterns and sub-themes that spanned the entire body of data. Using the constant comparative method

(Merriam, 1998), I then reviewed all the available data from the individual cases, including interview transcripts, notes taken during the interviews, and reflective comments literally comparing them to each other on emerging salient points throughout the process. As a part of this analysis, I also used the “find” function of Microsoft Word to search the interview transcripts in an effort to locate repeating words or phrases in the raw text of the interviews as part of a secondary coding process. As the various themes emerged, each was captured and arranged on a chart associated with the respective case subject (Stake, 2006). In working with the data, I constructed possible categories that ranged across all the cases. After building preliminary categories, I then performed a detailed review of the pertinent portions of corresponding text from the various cases. From this review, I noted specific reoccurring terms, phrases, and ideas in the data which resulted in multiple iterations of working categories. After working through various iterations of categories, I then developed a final chart including all the sub-themes making note of the reoccurring themes that which could be characterized as assertions (Stake). Using those emergent cross case themes, I constructed my initial analysis and conclusions in a narrative format below. Those cross case assertions were then tested with an additional member check as each of the subjects were asked to react to the findings in an effort to help build a level of internal validity. The outcome is noted below in Table 1.

Table 1

Cross Case Emergent Themes

Themes:	Subject:				
	Marty	Muriel	Bill	Mac	Don
A commitment to entity	commitment to his organization and department	the organization's fundamental principles appear to be a reflection of individual values	commitment to saving property an lives	commitment to organizational goals/ stability of family/ building followers	building trust and credibility for it and his perceived role in grooming additional followers/legacy
B leader/ follower dynamic	simultaneously in the roles of the follower and leader	-	disputes the idea of being a "follower"	not a "follower"/ worked simultaneously as a leader and follower	did not like the term "follower"/moved between role of leader and follower
C flow	Description of flow elements	Flow – time passed quickly	flow-like description/time slowed down	-	flow
D the "we" factor	use of "we" and "us" in discussing the organization	use of "we" in discussing the organization	"we," "team," and "family" despite the fact that this was largely individual	the "we" factor	the use of "we" in discussing his organization and purpose
E team member	being a part of a high-performing team	level of relatedness and connection to a high-functioning team	connectedness relationships/ belonging to some-thing	connection to the organization and its goals	being a contributing member of a high-performing team
F personal commitments	meeting his personal commitments	applied her personal values and God-given talents on behalf of the organization	subject values reflect who he is at an organization/ legacy/concern for the future	honoring commitments to players and family/personal rewards	honored multiple personal commitments to the organization including personal growth
G symbols	symbols	symbols	-	-	-

H leader impact	emotional discussion of deep feeling for leader	leadership abandoned him	no connection to leadership	respect for the leader	lack of continuity to the leader/goals at cross purposes
I achieve- ment	awe of accomplishments by the team	amazed at what the team accomplished	“awe” in describing the event	appears in “awe” of what he, his players, and the team’s accomplishment	a sense of awe in reflecting upon the accomplishment
J helping	-	“helping people”	“helping” mentality	“making a difference” in players life/helping mentality	building talent on behalf of the department

The quintain of cases.

This research study investigated exemplary acts of followership that arose from a series of unique cases from a diverse set of disciplines, including public works, coaching, volunteerism, fire fighting, and business. Each case was distinctive in terms of its focus within the broad category it represented. At the same time, each of the cases provided a distinguishing perspective regarding followership along with a corresponding richness and level of associated detail.

The quintain of cases chosen for this study emanated largely from a broad Internet search based on the criteria of the inquiry. Each case was notable in a number of ways. Remarkably, the exemplary acts took place with varying durations ranging from a matter of minutes to a period of nine years. In some cases, the act involved a distinct action while other cases were focused on project related activities that took place over a longer duration. The range of cases offered an interesting takeaway that there was no single distinguishing feature of followership as each story offered various points of comparison and contrast.

In terms of demographics, the subjects at the heart of each case had a wide variety of characteristics. As the chart below indicates, four of the five subjects were male. That being the case for this research project, there is nothing in the data to suggest that exemplary acts of followership are in any way connected with gender. All of the subjects were well-educated having earned at least a bachelors degree. Furthermore, each of the research subjects had varying levels of tenure within their organizations ranging from four to 51 years of service. Given the nature of change in the current world, it is somewhat noteworthy that two of the participants had served their organizations for more than 40 years. The age group of the subjects ranged from 32 to 73. Finally, the five exemplary acts studied took place in three different states, including Wisconsin, Minnesota, and Texas. Again, there is nothing remarkable about the location of these cases as each was chosen based upon the original research criteria as well as my convenience in accessing the subjects.

In each case, the subject participants were cooperative. Moreover, all subjects were able to refer me to a leader or peer/observer who helped corroborate the facts of the case beyond the other available supporting detail.

Table 2

Case Study Demographics

Name	Gender	Age	Position	Education	Tenure
Marty	Male	34	Casualty Claims Supervisor	Bachelor's Degree - English	14 years
Muriel	Female	73	Volunteer – American Red Cross	Bachelor's Degree – Public Health	51 years
Bill	Male	32	Firefighter	Bachelor's Degree –Natural Resources/ Associates Degree - Fire Science	4 years
Mac	Male	58	Associate Head Coach and Offensive Line Coach – University of Texas	Bachelor's Degree – Education	7 years
Don	Male	57	Civil Engineer	Bachelor's Degree – Civil Engineering	35 years

Themes from the cases.

Despite the diverse nature of the subject cases, a review of the body of work regarding exemplary acts of followership revealed some interesting similarities seen in several emerging themes. The patterns that arose from this quintain of cases included:

1. While leadership was clearly intertwined with followership and important in providing structure for the organization, the evidence indicated that it was not a primary source of motivation for the followers who performed the exemplary acts. In fact, in several cases, the follower's act took place despite the activities of leadership.
2. The followers in this study were primarily motivated to accomplish their exemplary act based upon their connection to their organization as well as the desire to fulfill the mission of their entity. Each of the subjects held strong

personal values that were congruent with those of their organization.

Ironically, while none of the subject participants were able to cite the mission of their respective organizations, all of the individuals completed their work based on their perceived spirit of the entity.

3. In each of the cases, the subject followers had a strong underlying personal motivation that was both important to them and parallel to accomplishing their work in the spirit of their organization. These motivations took the form of personal commitments on behalf of the subjects and involved a level of personal honor. In meeting these commitments, the subjects added a layer of meaning and richness to the lives.
4. After completion of their exemplary acts, each of the followers was in awe of what had been accomplished.
5. Even though the followers had close relationships with their respective corroborating leaders and/or peer observers in the study, they were able only to speculate about the specific motivations of the subject for completing their exemplary act. Many of the leaders and peer/observers were able to identify traits of the follower or provide an educated guess about the inspirations for the work. However, the leader or peer/observer was unable to pinpoint specific motivation(s) of the followers as they were retained in the minds of the individual subjects.

Discussion of findings.

A review of all the data from the five cases revealed a number of potential sub-themes. As noted in Chart 1 above, various patterns emerged in the findings of each case and many were repeated across several of the cases. However, only a small number of those themes were applicable to the entire body of work. For example, it was notable that many of the participants expressed great concern over the term “follower” or being labeled as such in the final published findings of this document. However, even though several of the subjects reacted negatively to being considered a follower, much preferring to be considered a leader, there was no agreement even on this point. Moreover, many of the participants worked in a dual follower/leader role in their exemplary act by both providing leadership to others in the completion of the task, while also following either the directive of their leadership in completing their act or as assumed, based upon the mission of the organization. From an organizational hierarchical perspective, there was little doubt that each of the subjects worked in a follower capacity. Nonetheless, even though there was no clear theme on this most basic point, several important patterns did emerge from the data from this multiple case design inquiry.

At the outset of this analysis, it should be noted that the concepts of organization, organizational purpose, and leadership are all somewhat intertwined. Inherently, organizations are socially constructed entities highly influenced by both the leaders and followers. In some cases, organizations are created by a single individual leader or group of leaders for a specific purpose or mission. Further, each organization has a distinctive culture and climate that make it unique. As the literature review suggested, leaders are generally responsible for developing this culture. The addition of followers seems to add

this blend, given that they work with their leaders to carry out the mission and objectives of the organization. And, while it is difficult to separate these connected concepts, the evidence from this study indicated that there are distinct differences in the level of motivation offered by the organization, its purpose, and its leadership from the standpoint of the follower.

Theme - While leadership was clearly intertwined with followership and important in providing structure for the organization, the evidence indicated that it was not a primary source of motivation for the followers who performed the exemplary acts. In fact, in several cases, the follower's act took place despite the activities of leadership.

The cases in this study clearly reflected the dynamic of leadership and followership and the pursuit of an organizational mission. However, while leadership was acknowledged by followers as being important for such things as providing structure and clarifying objectives, a primary finding from the cross-case analysis was that leadership was not a source of motivation for the followers in this study. In fact, the details of several of the cases involved situations where leadership was not only a non-factor in motivating the follower, but also demonstrated circumstances where leadership simply chose not to support the follower or even worked at cross-purposes with the subject in achieving the organization's objectives. For example, in the case of the firefighter, the evidence indicated that Bill was poised to work with his leader in rescuing a woman from a burning house. However, immediately before the attempt, Bill's leader seemingly left the area despite his assignment to the rescue team. Bill needed to make the choice about completing the rescue without any support. Moreover, even when the

broader leadership group of the fire department understood the scope of what Bill had accomplished, they chose not to support him when he was recognized for his work in fulfilling a key goal of his organization. In addition, the effect of state politics was responsible for a series of changes in leadership that threatened the continuity of the Marquette Interchange project and Don's work in coordinating the design and construction of this mega-project. Despite general approval for this construction project, the evidence from this case indicated that this very positive outcome was delayed due to the leadership at the organizational level.

Even in Marty's case where he had a strong connection with his leader, it served only as a secondary motivating factor. For instance, Marty clearly had strong feelings for his leader. Earlier in Marty's career, his leader had taken an interest in Marty's personal success and essentially served as a mentor to him. And, while Marty had great respect for his leader and he worked, in a sense, to repay his leader for his help in completing the exemplary act, the evidence from the case suggested that Marty was primarily motivated to do his work based on his long-term commitment to his organization. At the same time, in working to complete his exemplary act for Church Mutual, Marty was enabled to also honor an important personal commitment to his leader.

On the whole, the idea of leadership as expressed by the subjects suggested a distinct difference between leadership serving as a source of motivation and the recognition of its importance in general. It should be noted that this distinction by the subject followers did not suggest that leadership was unimportant. In particular, the cases revealed that the followers appreciated their leaders' role in maintaining the general health and stability of the organization. Moreover, each follower clearly embraced and

worked to complete the general mission of their respective organization that was ratified by their leaders. For example, Muriel talked about pursuing her volunteer work at the Red Cross while not having to worry about internal politics or fund-raising issues that the leadership needed to be concerned with. Also, there seemed to be little doubt that she, along with the balance of the followers in the cases studied, appreciated the structure provided by the organization that allowed them to pursue their exemplary acts. Further, in Mac's case it was clear that his leader provided strong direction in outlining the weekly and annual objectives of the Texas Longhorn football team. Even in the cases of Bill and Don, individuals who did not necessarily feel support from their leaders, each felt strong connections to their organizations that were managed by the leader. Thus, the followers were seemingly able to appreciate the environment created by their leader, even if they felt no personal connection to their leader. However, while leadership clearly provided a basis for the exemplary acts of followership through its facilitation of the organization, it was not a primary source of motivation for the followers.

In some respects, this apparent disconnect between an appreciation of leadership in general and leadership serving as a source of motivation for followers is difficult to reconcile. The evidence from the subject cases does not provide any particular insights on this idea. Suffice to say that the organizations that were a part of this study varied in size and scope of operations. In addition, the sheer pace of work and the need for results for organizations in general would seem to minimize the opportunity for personal connections between leaders and followers. Furthermore, the effect of leadership turnover might be a contributing factor in disrupting the continuity of organizations striving to achieve results. For instance, a report from the American College of Health Care

Executives reported that “the median tenure of a hospital CEO is only 43 months” (Sinnott, 2008, p. 29). In addition, another study of the health care industry cited CEO turnover rates of 14% in 2008 and 15% in 2007 with the prospect of increasing leadership churn in coming years (Carlson, 2009). Such data suggests that this level of leadership change at the CEO level, in addition to churn at lower layers of the hierarchical structure of an entity will likely contribute to the lack of continuity within an organization. Ultimately, such factors involving leadership may be a contributing factor to explain the lack of motivational power for followers.

Theme - The followers in this study were primarily motivated to accomplish their exemplary act based upon their connection to their organization as well as the desire to fulfill the mission of their entity. Each of the subjects held strong personal values that were congruent with those of their organization. Ironically, while none of the subject participants were able to cite the mission of their respective organizations, all of the individuals completed their work based on their perceived spirit of the entity.

Based upon the evidence from this study, the strongest theme that emerged was that the followers in this quintain of cases were primarily motivated to accomplish their exemplary act based upon their connection to their organization as well as the desire to fulfill the mission of their entity. In each case, the evidence of this connection between the followers and their respective organizations is seen in the discussion of achieving the task at hand. Specifically, the subjects talked about accomplishing their exemplary acts using the terms such as “we” and “us.” This idea of “team” was replete throughout the dialogue of all cases. Notably, this pattern was the same in Bill’s case which involved the

rescue of the woman from the fire. While the actual rescue was largely the act of a single person, even Bill discussed the incident using such terminology.

This finding was connected to the values of the followers as related to the organization. As the demographic data suggests, many of the subjects had long-term relationships with their organizations. However, the evidence from the cases suggested that each subject was drawn to their respective entity based on a perceived congruence between their personal values and those of the organization. For example, Muriel was drawn to the Red Cross noting it was “a worthy use of my time.” Bill, the firefighter, embodied the values of his organization as he risked his life to demonstrate the underlying helping mentality of the department. Marty worked to improve the customer service proposition of an organization dedicated to protecting religious institutions. Each of the followers demonstrated their dedication to the values and mission of their organization through the actions in their cases. Further, all the cases demonstrated the idea of like-minded individuals working to achieve the mission of their organization. None of the subjects, including the firefighter, saw themselves as working in a vacuum, but all enjoyed the camaraderie of the team in completing the mission at hand.

It was also interesting to note that while the each of the subject followers worked to complete the purpose of their respective organization, none were able to articulate the specific mission statement of their entity. Yet, each was definitively interested in working toward their perception of the purpose of the organization. In many respects, each of these followers was working toward completing their exemplary act within the spirit of the organization.

In reviewing the potential source of this connection to their organization and its mission, several significant connections to existing research are noted. In particular, Kelley (1992) discussed the idea of paths to followership as seen in a model involving expression and transformation. Those individuals who see followership as a path to express themselves are noted to be generally comfortable with key elements of their life, including skill and accomplishments and are motivated toward the accomplishment of organizational tasks (Kelley). The evidence from this body of cases suggested that each of the subjects sought to express themselves through their work in achieving the work of their organization. Moreover, each of the subjects appeared to perform their exemplary act as what Kelley (1992) termed a “lifeway” follower. Kelley discussed this path to followership recognizing that such followers have “the instincts and habits of leaders, but choose the follower role” (p. 84). In choosing this path, these followers are seen as natural servants, or a “servant-first” (Greenleaf, 1977, p. 28), who focus on making sure that other people’s highest priority needs are being taken care of. This idea was clearly illustrated by the followers in the case studies as the evidence indicated each ascribed to a “helping mentality.”

Moreover, this body of research also is connected to a parallel theory involving the concept of “invisible leadership” (Hickman & Sorenson, 2007). Based on this concept, such leadership is characterized by “situations in which dedication to a powerful purpose is the motivating force for people to take action and, at times, even to give up personal needs and safety” (Hickman & Sorenson, p. 1). As defined by Hickman and Sorenson, the key components of invisible leadership include a compelling common purpose, individuals who are committed to that purpose and willing to take ownership

and action, the “self-agency” to act on the common purpose, the readiness to use personal strengths, and a willingness to work beyond self-interests. In addition, Hickman and Sorenson discussed the need for the opportunity to work toward that collective purpose.

Based on the African concept of ubuntu, the notion that “a person is a person through others” (Mangaliso, 2001, p. 24), “an individual’s most effective behavior occurs when he or she is working toward the common good of the group” (Hickman & Sorenson, 2007, p. 2). The outcome is a level of synergy where all individuals work to a common goal.

The idea of working to the common good while suppressing personal interests is the definitive theme arising from this quintain of cases. In telling their stories, each of the subjects clearly expressed the preeminence of accomplishing their respective organizations’ goals largely through their repeated use of the words “we” and “our” in detailing their work. Further, it should be noted that even though several of the participants were later recognized for their work in the exemplary acts, none were personally motivated to achieve such awards at the expense of the organizational objectives or their team members. The concept of “invisible leadership” best captured the collective idea expressed by the research subjects and also seemed to distinguish the idea of leadership beyond being confined to a person.

Theme - In each of the cases, the subject followers had a strong underlying personal motivation that was both important to them and parallel to accomplishing their work in the spirit of their organization. These motivations took the form of personal commitments on behalf of the subjects and involved a

level of personal honor. In meeting these commitments, the subjects added a layer of meaning and richness to the lives.

In many respects, the idea of ubuntu and its associated “respect and responsiveness” within the organization (Mangaliso, 2001, p. 24) might also extend to another compelling theme that arose from the case studies. While each of the subjects worked to achieve the goals of their respective organization, they also sought to honor strong underlying personal commitments that were important to them. By honoring these perceived obligations, each of the subjects added greater personal meaning and richness to their work, which, in turn, provided them with an additional source of motivation. Moreover, aside from the theme of the idea of “personal commitment,” each of these obligations varied based upon the specific interests of the individual.

As each of the subjects detailed the nature of their exemplary act, a personal commitment emerged in how these followers went about completing their work. In many respects these personal obligations ran parallel to any commitments to the organization and in some respect were enabled by the entity itself. For example, while responsible for the offensive line at the University of Texas, Mac’s work was driven to “make a difference” in the lives of the student-athletes he worked with. As Mac described this connection to his “kids,” it was clear that while organizational goals were important, helping them succeed in life was another important goal in his work. As such, Mac talked about the intrinsic rewards associated with building and maintaining such relationships assuming an almost parental-like role in doing so. My observation was that his genuine level of caring for the players added great depth to his life. At the same time, Mac

recognized that failure at the organizational level would threaten that important personal motivation.

Similar personal motivations emerged for each of the study subjects. For Marty, the opportunity to work on the e-File project served as a type of payback to a leader that believed in him early in his career. Muriel found personal meaning in being able to use her God-given talents in nursing while helping others. Don expressed himself in both using his talents to build credibility for his organization, but also to mentor and help his staff in ensuring the professionalism and continuity of his department. Finally, Bill put in extra time in training and taking part in combat challenges that would prepare him to save property and lives on behalf of his organization when called upon to do so.

As described by the subjects, these personal motivators seemed to illustrate Maslow's (1954) idea of achieving self-actualization. According to Maslow's hierarchy of needs, in moving to the highest level, these subject followers realize their potential in terms of personal development and expression (Maslow). Moreover, while working in the context of achieving self-actualization while also simultaneously working in concert with organizational purpose, the followers demonstrate strong levels of what Spreitzer (1995) termed psychological empowerment and building self-esteem as well.

In analyzing these personal motivations, it is difficult to separate them from the preeminent theme of organizational accomplishment. In many respects, it is difficult to envision whether the objectives of the organization could be met without these intertwined personal goals or if the outcome would be as remarkable. Nonetheless, these personal motivations for the subject were very real and important to them.

Theme - After completion of their exemplary acts, each of the followers was in awe of what had been accomplished.

Another theme that emerged from the evidence was that after the successful completion of their respective exemplary act, each of the followers seemed to be in awe of what had been accomplished in the process. In completing their work, four of the subjects discussed what might best be described as “flow-like” conditions (Csikszentmihalyi, 1997). Also, whether the individual had truly achieved a state of flow in their work, each subject seemed involved in their activities to the extent that they did not comprehend the immensity of the outcomes. Only upon reflection or through discussion with other individuals not involved with the task did the subjects understand the level of completion. This idea may have been best expressed on behalf of the group by Don who related the feeling:

You get so busy doing your job and then every so often I would stand back or someone would say something to me at a party, and then I'd really be in awe that 'holy smokes, little Don is doing this thing.' So, I became in awe of what we were accomplishing. That kind of surprised me. You know, because you don't feel like you...you know it's a big project, but you don't feel like you're doing anything different.

Theme- Even though the followers had close relationships with their respective corroborating leaders and/or peer observers in the study, they were able only to speculate about the specific motivations of the subject for completing their exemplary act. Many of the leaders and peer/observers were able to identify traits

of the follower or provide an educated guess about the inspirations for the work.

However, the leader or peer/observer was unable to pinpoint specific motivation(s) of the followers as they were retained in the minds of the individual subjects.

The final pattern, evident from the data, was the idea that even though the followers had long-term and close relationships with their respective corroborating leader and/or peer observers in the study, the latter had difficulty in necessarily pinpointing the specific motivations of the subject for completing their exemplary act. The speculation by leaders and peer observers regarding the motivations of followers was evident from a close review of interview text, which was typically couched in verbiage beginning with the phrase, "I think." Many of the leaders and peer observers were able to identify particular traits of the follower or provide an educated guess about the inspirations for the exemplary act of the follower. However, based on the data, the leaders or observers appeared to have had no direct information about follower motivation. A number of potential reasons exist for this observation. One plausible explanation was that the leaders and peers were simply not privy to the internal thoughts of the subjects. This made sense to the extent that many of the primary and secondary motivations of the subjects identified appeared to be very personal in nature and/or were simply not shared with leaders or peers. Interestingly, the leadership of each of the organizations represented was responsible to some extent in placing the follower in a position to do the exemplary act. Thus, it would be logical to assume that the followers were perceived by their leaders to have demonstrated strong motivations to do similar previous work for their respective

organizations. For whatever reason, it is notable that the leaders and peer observers had no specific insights into follower motivation.

Chapter 5

Development of Meaning and Conclusions

In the first pages of this document, I posed the question, “what compels followers to follow?” This study was a matter of great personal interest to me and an attempt on my part to answer that question. The five cases that made up this inquiry indeed provided greater understanding of the motivations and inspirations of those followers who had engaged in exemplary acts of followership through several previously identified themes. While the discussion findings were an effort to provide an explanation for the patterns, the final chapter of this document was intended to develop meaning from the outcomes. In an effort to clarify the implications of the work, I have commented on each of the themes while referencing previous research where available and applicable. In addition, I have suggested potential synergies between some of the themes as part of my dialogue regarding a search for meaning.

The final aspects of this chapter discuss relevant recommendations for practice that are logical extensions of the discussion of meaning. In addition, I have presented my conclusions, observations, suggestions for future research, delimitations of the study, and limitations.

Meaning

Theme – “leadership ...was not a primary source of motivation for the followers...” Within the context of the various cases studied, it was clear that leadership did not emerge as a source of motivation for the subjects who performed exemplary acts of followership. While such a finding might appear to be counter to the need for inspired

leaders to provide direction for their organizations or the great call for leadership development as evidenced by the current business best seller list of books, it was not necessarily at odds with the entire idea of leadership per se.

In fact, the findings from this study suggested that the followers studied appreciated the structure of the organizations built or managed by their leaders. Such structure was manifested in a number of ways including the actual administration of the organization, such as in ensuring the financial stability of the entity or in providing the environment that enabled the individual follower to concentrate on their individual task. More importantly, the leadership of each of the organizations studied appeared to provide a culture and climate that allowed for psychological empowerment on the part of followers as the basis for the extraordinary results.

This finding was supported by previous research in a number of ways. First of all, empirical research had previously demonstrated a positive relationship between the emotional climates and organizational performance as measured by strategic and outcome growth (Ozcelik, Langton, & Aldrich, 2008). Also, beyond the idea of positive organizational climates, another related area of research discussed psychological empowerment. In this subject area, the literature of many authors was replete with the idea of participative management and decision sharing with employees as part of performance (Cotton, Vollrath, Froggatt, Lengnick-Hall, & Jennings, 1988; Wagner III, 1994). However, beyond participative management, other researchers discussed empowerment in terms of four dimensions including a sense of meaning, competence, self-determination, and impact as reflecting a “proactive ...orientation to one’s work role” (Spreitzer, Kizilos, & Nason, 1997, p. 681). Under this conception,

empowerment appeared to be internally generated rather than being granted by a leader. The discussion by Spreitzer, et al. regarding the four cognitions of empowerment seemed to directly parallel the descriptions of the followers in this inquiry. Notably, those four factors related to how an individual was energized by their work, belief about personal capabilities to handle assignments, perceptions of being responsible for originating actions as opposed to taking orders, and a sense of making a difference in the organization (Spreitzer, et al.). In each case, the subject followers demonstrated psychological empowerment in completing their exemplary work. To a large extent, the leaders of the respective entities should be credited for creating such an environment that allowed for the conditions of psychological empowerment to exist as Spreitzer noted these conditions are assumed to be “shaped by a work environment” (1995, p. 1444).

In keeping with that thought, the results of this inquiry also suggested that organizations can necessarily achieve outstanding results without strong leaders. Moreover, several of the followers demonstrated this point by producing extraordinary outcomes in spite of their leaders. For example, Bill completed his act without the help of leadership as he rescued another human being in a single act of courage. For Don, his exemplary work was done despite numerous changes in leadership at a variety of levels in his organization. Ultimately, logic would seem to indicate that a synergy between leadership and followers would translate into better outcomes for an organization. At the same time, the findings would suggest that having a good leader is not necessarily a requirement to be a great follower.

Theme – “the followers ...were primarily motivated to accomplish their exemplary act based upon their connection to their organization.” According to the data, follower connection to their respective organization was the strongest finding from the research study. However, while each of the followers appeared to be drawn to their respective entity and fulfilling its purpose, the most intriguing aspect of this finding was that none of the subjects could recite the mission statement of their organization. At the same time, each of the followers demonstrated the purpose of their organization through their exemplary acts.

This issue raises an interesting conundrum between explicit and implied organizational missions. The literature regarding mission statements generally describe them as an expression of purpose and intent generated in an effort to create common understanding in an organization (Toftoy & Chatterjee, 2004). Typically, creation of a mission statement was generally regarded as an organizational strategic “best practice” assumed to lead to superior performance (Desmidt & Prinzie, 2009; Toftoy & Chatterjee). Intuitively, the purpose of a mission statement made great sense. In fact, Toftoy and Chatterjee proposed a connection between the “lack of a well-written mission statement” (p.42), and the high rate of small business failure. Yet, other researchers have found that “the presence of a mission statement ... (was)... not automatically associated with superior firm performance” (Bart & Baetz, 1998, p. 848).

It seemed clear from the cases that each of the followers had a strong sense of organizational mission, but could not discuss it in terms of an overt statement. Thus, it would appear that an implied mission was assumed by the subject participants for some reason. In keeping with this idea, Schein (2004) discussed core mission as a “complex

multifunctional issue” (p. 90) and also offered that a “mission is often understood but not well articulated” (p. 93).

Several possibilities might explain the phenomenon of mission-related work without the ability to provide a concrete explanation of an articulated organizational purpose. One possibility is related to organizational culture. For example, despite the fact that the least tenured subject studied had been a member of his organization for only four years, a strong underlying corporate culture might explain the exemplary work in fulfilling the mission. Supporting this idea was the tenure of the remaining subjects had substantially longer associations with their organizations ranging from seven to 51 years. The potential exists that each of those followers were simply immersed in an understood organizational purpose. Therefore, their work may have been a product of culture or was simply intuitive to them based on their knowledge and experience with the organization. A final possibility is that each follower simply had a similar personal mission and brought it to an organization where they were able to express themselves accordingly.

While a shared understanding regarding a mission would seem essential to the strategic health of an organization, this finding seems to run counter to this idea. As a part of that discussion, a remaining open question concerns the value of a well-articulated mission statement for the balance of an organization’s followers who have not performed exemplary acts and may not have a clear understanding the entity’s purpose or direction.

Theme- “...the subject followers had a strong underlying personal motivation that was both important to them and parallel to accomplishing their work in the spirit of the organization.” In each case studied, the subject followers

performed exemplary work. Moreover, in doing so, each subject also used their respective act as an opportunity to demonstrate a related passion that also advanced the mission of the organization. Such parallel work appeared to be an extension of empowerment in addition to being an expression of personal values.

The discussion of psychological empowerment previously outlined four important base cognitions with the idea of “impact” as notable among them. Within this construct, impact “reflects whether individuals feel as though they are making a difference in their organization” (Spreitzer, et al., 1997, p. 682). Spreitzer further discussed the concept of impact in terms of influencing the system as part of goal attainment. Spreitzer’s work regarding empowerment supported the idea that an individual follower might have impact on an organization by adding value while exercising personal influence as part of attaining group goals. For example, such impact can be seen in Mac’s work of making a difference in the lives of his kids. It was also apparent in Don’s use of a large construction project to build long-term employee capability to the benefit of his organization. In addition, such actions, which were representative of all the followers studied, would have far-reaching impact well beyond the completion of the exemplary acts.

In addition, the analysis of findings indicated that each of the followers was drawn to their organization, in part, due to a congruence of values. Values had been defined as “the underlying precepts or principles that lead to an esteemed standard of character” (Williams & Ferris, 2000, p. 29). Those strong underlying personal values were expressed in how the followers went about accomplishing their work on behalf of

the organization. Further, each follower brought a level of authenticity and personal wholeness to the organization that was reflected in a secondary personal passion as well.

Theme – “...each of the followers was in awe of what had been accomplished.”

According to the criteria of this research project, each of the exemplary acts studied was recognized by either the entity or a third party organization. However, it became obvious that none of the individual followers was motivated to complete their work in an attempt to win honors or seek recognition. In fact, many seemed embarrassed by the attention drawn to them as a result of any recognition. Only after reflection about their respective work and/or receiving notoriety did the various followers begin to understand the gravity of what they had accomplished. While the majority of the cases involved teams of people, several of the exemplary acts were performed solely by individuals. Nonetheless, the five followers offered that they could not have accomplished their extraordinary outcome on their own. As such, there was recognition of the synergy of working together with other like-minded individuals towards a common goal.

Theme – “...leaders and/or peer observers ... (were)... unable to pinpoint specific motivation(s) of the followers...” The data from the cases indicated that each the leaders and/or peer observers who provided corroborating evidence about the exemplary acts had a pre-existing relationship with their respective follower. In some cases, those relationships were built over long periods of time extending for years and decades. However, aside from educated guesses about an individual followers motivation based upon traits or observations, the evidence suggested that none of the peers or leaders could clearly indentify follower inspiration.

There are several possible explanations for this point. For the most part, the subject of personal motivation appeared to be a topic of discussion between leaders/peers and followers. Moreover, the motivating forces in play for any individual follower seemed highly personal in nature and, for the most part, remained a private matter. The key take away from this theme was that leaders or peers were in no position to know about the specific motivating forces of any individual follower and could only make assumptions.

Observations

The outcomes of this inquiry resulted in several themes that were consistent across the five cases studied. Yet, in my estimation, each of those themes was not equally weighted in terms of importance. From my perspective, additional commentary regarding the magnitude of the results is warranted.

As previously noted, perhaps the most important finding from this inquiry related to the leader’s role in creating rhetoric associated with a mission statement as opposed to

a leader's ability to provide organizational space for followers to actually live the mission. While these ideas might appear to be parallel in nature, the study demonstrated an important distinction between the two concepts. Too often, organizational mission statements appear to be constructed as part of an expectation for various audiences, including board members, customers, shareholders, etc. As the product of word-smithing, such statements might incorporate important verbs that provide a level of assurance to factions of stakeholders, yet do little to provide real guidance to followers. Conversely, as demonstrated in this research project, it was clear that the studied followers perceived a purpose implicit to their organization far beyond any written statement. Such purpose enabled their connection to the organization, and their exemplary acts became important outcomes that embodied the lived mission of the entity. At the same time, it was unclear how this purpose was communicated to the followers. Potential sources of reference might include a strong organizational culture and/or climate, a level of an internally-generated empowering behavior from the actors themselves, or some other unknown means. The important distinction, however, remains the significant difference between organizational rhetoric and purposeful action on behalf of the entity.

A second interesting point of note, from my standpoint, related to an apparent tension for many of the subjects in regard to the use of the labels, "leader" and "follower." The findings from the subject cases did not provide a consensus in regard to an emergent theme. At the same time, each of the subjects acknowledged their roles as a follower in performing their exemplary acts while several expressed concern over this label as applied to them. Ironically, even though those same subjects preferred to view themselves as leaders and had acted as such in varying capacities, several also lamented

the fact that they desired additional responsibilities or had never been offered the opportunity for a larger leadership role in their respective organization. Thus, an apparent paradox emerged from the actors wherein leadership and followership were based on the eye of the beholder.

This conundrum further suggested that leadership and followership might be portrayed in a spectrum with any number of resulting combinations between the two concepts. While the placement for any single leader/follower on such a continuum was not quantifiable in this research, especially given the interpretive nature of this study, it was clear from the cases that there were notable variations between the individual subjects. These important differences between the subjects, as related to placement on a follower/leader spectrum, were noted in terms of individual levels of talent, education, passion, aspirations, and limitations, i.e. available time or age.

Recommendations for Practice

Given the findings of this study and their meaning, several recommendations for practice became evident. While the vast majority of available business literature would suggest that leaders essentially need to point the way for their followers, the findings from this study indicated otherwise. In particular, the followers in this study completed exemplary acts as a result of their connection to their organization and its purpose. Such “lifeway” followers were guided by the compelling purpose of their entity, understood what was needed to successfully complete their work, and took the initiative to do so without the direction of their leaders. Moreover, the work resulted in exceptional outcomes recognized by the organization or third-party entities.

Such outcomes should guide practitioners to focus on issues related to organizational mission statements. As this study demonstrated, the subject followers completed their exemplary acts without being able to articulate their organizations' mission statement. Such a finding suggested that organizational mission may be implicit and communicated outside the context of a written statement. While many firms have invested resources in constructing grandiose and often an all-encompassing mission, the previously reported literature was not clear regarding the value of such a statement. Intuitively, it makes sense to have a well-communicated guiding purpose so that the members of the organization understand its intent and direction. At the same time, it would seem such a statement is not a stand-alone document. Leaders would be wise to leverage the concept of "invisible leadership" to support the organizational mission with a congruent culture and an expression of organizational values.

Leader's who work to help followers clearly understand, communicate, and live the organization's purpose and values would seem to build an advantage in recruiting and retaining the members for the entity. Given the idea that the exemplary followers studied were originally drawn to their organizations based upon perceived congruent purpose and mission, it seems logical to attract individuals who hold similar values as opposed to attempting to convert members after the hiring process.

Moreover, beyond providing a clear description of mission and goals, the evidence from the research also suggested that leaders should create an empowering organizational culture that enables followers to complete their work. By providing such an environment, leaders have a greater opportunity to leverage the passion and skills of followers as well as levels of engagement in an effort to help the entity achieve its

objectives. Such a premise was supported by empirical research which indicated a positive relationship between the emotional climates and organizational performance as measured by strategic and outcome growth (Ozcelik, Langton, & Aldrich, 2008). Additional research also supported this premise as a leader's positive emotional management practices impacted both individual and group performance (Ozcelik, et al.). Other likely outcomes from this type of leader-enabled environment would include elevated levels of trust, increased organizational citizenship behaviors, and outstanding results.

Finally, the discussion of case findings pointed to a congruence of values between the followers and the organization. During the course of working with various subjects in developing the case data, I noted that several followers commented independently that they distinguished between those in their organization who were followers from those who liked the idea of being a follower. It would seem that leaders should refine and clearly articulate organizational values to both state what is important to the group and as part of a strategy to attract like-minded people to work in pursuit of the collective purpose.

As noted at the outset of this document, the impetus for this study was my interest in the varying commitments of followers in an organization. Those of us who work in an organization are acutely aware that some individuals simply put in their time, while others continue to strive by going above and beyond any expectations. This study offered only a glimpse into one aspect of the motivations of followers. In many respects, it is a first step for tapping into the feelings of followers. Considering that we are all followers to some degree and that we likely share the similar experience of recognizing that not all

followers have equal commitments, much more work needs to be done to gain a greater understanding of follower motivations. If followers indeed contribute 80 percent of the organizational success, as suggested by Kelley (1992), allowing “lifeway” followers to fully express themselves would be seen as a plan for long-term organizational success. It is my hope that this project inspires others to continue the investigation of followership.

Recommendations for Future Research

This study provided a number of directions for future research on issues related to followership, leadership, and the role of the leaders in creating organizational culture and climate. The findings of the study noted that exemplary work was completed by followers who could not articulate their organizations’ mission statement. Considering this outcome in conjunction with the existing literature that was not conclusive on the value of a mission statement, additional inquiry regarding the essence of such statements of purpose would appear to be indicated. Moreover, further study is needed to investigate the nature and role of explicit and implicit missions within organizations.

In an area related to mission, there was a noteworthy discussion about values and any relationship between organizations and followers. The study suggested that the followers were attracted to their organizations based on a perceived alignment of values. Additional inquiry is needed regarding how a clear statement of values by an entity might provide benefits in attracting a larger number of like-minded servant followers in the recruiting process and in overall organizational results.

In addition to organizational benefits, a study of the effect of reflective leaders who could better tap into follower motivations would seem appropriate. Such a line of inquiry might explore the effect leader-follower effectiveness as well as levels of personal satisfaction and effectiveness.

Finally, this interpretive study focused solely on exemplary acts of followership. While much attention has been devoted to leaders, the review of literature suggested that researchers have considerable work to do to understand the multitude of general issues pertaining to followers.

Restatement of Delimitations and Limitations

The delimitations of this study reflected a number of the natural boundaries of the subject cases. In particular, the research focused solely on those individuals who had performed exemplary acts of followership as previously defined. In addition, all of the research participants were based in the central corridor of the United States. Finally, all of the exemplary acts occurred within the past 10 years.

This study provided unique insights into the motivations of followers who had completed exemplary acts of followership. However, even though the cases offered rich data regarding the motivations of followers from five distinct disciplines, they represented only a small sample of these fields including college coaching, business, public works, volunteerism, and firefighting. Also, the findings of this inquiry cannot be construed to broadly extend to other populations or individuals involved in similar fields. Moreover, this research focused solely on individuals who had performed exemplary acts of followership and not on followers at large. Further, given the limited sample of the

cases and the interpretive nature of the study, the results of this research cannot be generalized.

Conclusions

This study was designed to investigate and gain greater insights into the motivations and inspirations of followers who had engaged in an exemplary act of followership. With a central question intended to examine the conditions or factors that motivated followers to engage in an exemplary act of followership, this multiple case inquiry revealed several significant themes.

The evidence from this interpretive research study suggested that the motivations of followers for their exemplary work may be primarily organization-centric. This particular body of cases revealed that the followers in this inquiry had a decided passion for their organization and for fulfilling their perceived mission of that entity. In addition, another theme that emerged from the evidence addressed the idea that the study participants also felt personal commitments within the context of how they went about their work. This finding suggested that these personal motivations ran parallel to the interests of the organization and also provided richness and meaning for the followers as they completed their work.

Notably, leadership did not emerge as a source of motivation for the exemplary exploits of the subject followers. In this study, the leaders offered varying degrees of assistance to the followers in completing their exploits. Moreover, the subjects in the study appeared to appreciate the outcomes of elements of leadership as seen in the organization. Specifically, leadership appeared to enable the followers by providing

structure and stability for the organization. At the same time, leaders as well as peer observers were unable to discern the specific motivations of the follower.

The outcomes from the cases seemed to inspire a level of awe in the followers studied. The implication was that the respective results of the cases were beyond the comprehension of those followers based on the scope and accomplishment.

In the final analysis, this study confirmed the idea that leaders and exemplary followers are separated only by the role each plays.

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Appendices

Appendix A

Subject Interview Protocol

Interview Protocol

Introduction

Thank you for agreeing to participate in this interview as part of my dissertation regarding exemplary acts of followership. For the purposes of this study, I have defined an exemplary act of followership as “an extraordinary activity or exploit of a follower within an organization.” According to my research, your act fits that definition. My intent is to conduct interviews with several people in various fields who have also performed similar exemplary acts for the purpose of better understanding the motivating factors and drivers on the part of the follower.

As we have previously discussed, you have agreed to discuss the specific act to help me understand followership to a greater degree. Although we talked about this in our prior meeting, I want to remind you that I will be recording this interview for transcription and further analysis. Following the transcription, I will return a copy of the interview to you so that you can review and make any changes or corrections.

Also, based on the nature of your specific exemplary act, I may not be able to keep this confidential. In addition, while this interview will be completed as part of my personal dissertation process, my hope is the data gathered will serve as the basis for future articles and books related to understanding the topic of followership. In the event of publication of details of your interview, your name and non-essential details of the events will be changed to mask the specific incident.

At this point, you have signed an IRB form in accordance with procedures regarding research connected to the University of St. Thomas in Minneapolis, Minnesota. Before we begin this interview, do you have any questions for me at this point?

Questions

Demographic Information:

- Name
- Age
- Gender
- Occupation/Length of time in this position
- Employer
- Level of Education
 - High School graduate
 - College/University graduate (two-year; four-year)
 - Masters Degree
 - Other_____

- In our pre-discussion leading up to this session, we talked about the events that you were involved in that took place on or around _____. Thinking back to this particular incident, please provide me with any background leading up to this circumstance.
- Take me back to the specific event and tell me about what took place.
- What organization did you belong to? What was your job title in the organization? How would you define your role? How long had you been part of this organization? Tell me about the mission of the organization? What prompted you to join this organization? Tell me about how you feel about this organization.
- At the time of the event, who did you consider your “leader” within that organization? Tell me about him/her and about your relationship with the leader? How long had you had this relationship with the leader? Tell me about the inter-relationship between your leader and the organization. Can you give me a sense of how you felt about this person?
- Had you ever performed a similar act of exemplary followership in the past? If so, what were the circumstances?
- As you think back to this specific event, what was the primary factor that motivated you to take the action you did?
- How did your connection with the organization impact your motivation to perform this exemplary act of followership, if at all?
- In what way, if any, do you feel your connection with your leader or leaders impacted your performance in this event?
- Thinking back, were there any other particular relationships or circumstances that were factors in your performance?
- Are there any aspects within your personal background which might account for the motivation to perform in the manner you did?
- After this event took place and others recognized your actions, were there any changes that you noticed in regard to being a follower in the organization? How about any specific changes in your relationship with your leader? Were there any other changes in general that you noticed?
- Is there anything else that I have not asked you about this event that you would like to add that you feel is important to my understanding of this incident and your involvement as a follower?

I certainly appreciate your time for this interview. Thank you again for participating!

Appendix B

Secondary Observer Interview Protocol

Interview Protocol

Introduction

Thank you for agreeing to participate in this interview as part of my dissertation regarding exemplary acts of followership. For the purposes of this study, I have defined an exemplary act of followership as “an extraordinary activity or exploit of a follower within an organization.” My intent is to conduct interviews with several people in various fields who have also performed similar exemplary acts for the purpose of better understanding the motivating factors and drivers on the part of the follower. It is my understanding that you may have either observed or have knowledge or insights regarding what I have labeled an “exemplary act of followership” performed by _____ that took place at _____ on _____.

Previous to our discussion, I have already interviewed _____ regarding this “exemplary act of followership.” Although we talked about this in our prior meeting, I want to remind you that I will be recording this interview for transcription and further analysis. Following the transcription, I will return a copy of the interview to you so that you can review and make any changes or corrections.

While this interview will be completed as part of my personal dissertation process, my hope is the data gathered will serve as the basis for future articles and books related to understanding the topic of followership. In the event of publication of details of your interview, your name and non-essential details of the events will be changed to mask the specific incident.

Before we begin this interview, do you have any questions for me at this point?

Questions

Demographic Information:

- Name
 - Age
 - Gender
 - Employer
- How long have you known _____? What is your relationship to _____? Please tell me about relationship with _____.
 - As you have observed _____ over the time you have had a relationship, please describe him/her to me.

- What organization did you belong to? What was your job title in the organization? How long had you been part of this organization? Tell me about the mission of the organization? Tell me about how the members feel about this organization.
- In our pre-discussion leading up to this interview, we talked about the events that you have observed or have knowledge of that took place on or around _____. Thinking back to this particular incident, please provide me with any background leading up to this circumstance.
- Take me back to the specific event and tell me about what took place.
- Following the “exemplary act of followership,” did you have any conversations with _____ about the incident? If so, tell me about the nature of those discussions with _____.
- As you reflect back upon the “exemplary act” performed by _____, do you have any further insights into this incident?
- Have you ever observed _____ perform what you would consider any similar acts of exemplary followership in the past? If so, what were the circumstances?
- As you consider the incident and _____, how would you account for the motivation or inspiration of _____ in performing this “exemplary act of followership?”
- After this event took place and others recognized _____’s, did you notice any changes in how you perceived _____? What about your observation of the perceptions of _____ by other members of the organization?
- Is there anything else that I have not asked you about this event that you would like to add that you feel is important to my understanding of this incident?