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The Future of Leadership in Learning Organizations

Bernard M. Bass

State University of New York at Binghamton

Executive Summary

Among the most prominent developments in recent years in the investigation of transformational leadership has been the confirmation of the utility of transformational leadership for increasing organizational satisfaction, commitment, and effectiveness, and the 6-factor model of the transformational-transactional factorial structure. Also, we have increased our understanding of transformational dynamics. In this paper, I hope to show how transformational leadership relates to the creation and maintenance of the learning organization. To do this, the meaning of transformational and transactional leadership and the Full Range of Leadership will be discussed and how the components of transformational and transactional leadership contribute to a learning organization will be examined. The future of leadership and administration will be considered in the light of the current state of affairs in educational leadership.

About the Author: Bernard M. Bass is a Distinguished Professor in the School of Management and Director of the Center for Leadership Studies at Binghamton University. His current research interests focus on leadership in military contexts and measuring a full range of leadership styles.

The Learning Organization

Peter Senge's (1990) seminal book "The Fifth Discipline" introduced us to the art and practice of the "learning organization". I shall try to look at the leadership that will be needed and effective in future learning organizations. First, I will be focusing on organizations, in general, with heavy emphasis on productive and service enterprises. Then I will examine the current and future state of educational leadership.

Senge pointed out that organizations need to adapt to their changing environments. Local line leaders in the organization and high level executives as well as internal networkers and community leaders are needed who can motivate and direct the organization and its members. to learn to adapt to the changes. The changes in the economic environment from local, to national, to global markets requires new perspectives. Interspersed with these changes are the rapidly ever-changing developments in information technology with which the organization and its members have to become intimately involved for acquisition and processing of information from the internal and external environments. The organization has to learn how to adapt to changes in the diversity of its workforce and customers as well as to the changing demands for social responsibility. (At the time of this writing, the Chairman of the Ford Motor Company declared publicly that its most profitable vehicle, the Sports Utility Vehicle (SUV) was a "gas guzzler" and environmentally unfriendly in a variety of other ways. While he didn't suggest that Ford abandon its SUV production, production of the heaviest Ford SUV, the Excursion model, has stopped and he indicated that developments were underway to make the popular SUV more environmentally friendly. This was said before both the National Highway Traffic Safety Administration and Ford independently became aware of statistical evidence of the high accident record of the Bridgestone/Firestone tires its SUV Explorer was using).

Organizations are changing by "dejobbing", that is, changing is the concept of the job as a separate full-time position with a specific bundle of tasks. The concept of the jobs is being replaced by the unbundling of the tasks of a traditional job. Instead of an organizational member having one permanent bundle of tasks to complete, the member will need to work alone or in teams on temporary tasks and in temporary teams. Changes will coincide with changes in organization needs. Some tasks may be outsourced; some may be shifted to within the organization (Bridges, 1995).

Goals of the Organization

Adaptability characterizes the learning organization. It proceeds to work within boundaries guided by strategies. Increasingly, the leaders of learning organizations will set goals either through participation or direction of their various constituencies. In the case of school systems, as learning organizations, they will strive to align the educational interests of relevant governmental agencies, school boards, superintendents, principals, teachers, students, parents and the community. They also will strive to increase the commitment of their various constituencies to the organization's goals.

The learning organization will be dissatisfied with the status quo. It will proceed by looking at ways to improve itself, setting up criteria for appraising the effects of changes, creating alternatives, adopting and implementing those that work out well and abandoning those that do not work out well. In this process, reliable and valid measures will be employed.

Learning organizations have adaptable cultures as illustrated by the firms, Walmart, Pepsico, and Hewlett Packard. In the late 1980's, the firms saw leadership as an engine of change. They stressed the value of meeting their constituents' needs. Adaptable new systems were introduced. Adaptable managers were favored. The results showed in the early 1990's. In comparison, a firm like Texaco was seduced by its dominant position in the oil and gas market and its prior successful growth and profits. As Robert Blake would say, it was fat and happy, and lacked the adaptability to change. Likewise, Coors Beer lacked the adaptability of a learning organization and couldn't accept the value to its continued success of its relations with shareholders, customers, and employees. It was unable to cope with need to change in attitudes. Again, in the 1980's, the cultural rigidity of General Motors was illustrated by its refusal to promote managers who showed too much leadership! This may have contributed to its decline in share of the automobile market helped along by its unwillingness to change its auto designs, manufacturing processes, and attention to foreign competition.

The leadership in the organization has to change with the development and maturation of the organization. Early on, in creating the organization, the leaders themselves have to serve more as Animators. In the organization's building phase, they must be more Creators of Culture. To maintain the organization they need to be more Sustainers of the organization's culture. And when changes in the organization are needed, they must become Change Agents. (Schein, 1995).

The New Leadership Paradigm

The Prescription for Leadership in Learning Organizations

Organizations that are ready, able, and willing to change are more *transformational* than *transactional* in terms of the new paradigm of leadership (Bass, 1996).

In a recent landmark essay in the *Leadership Quarterly* entitled "Transformational/Charismatic Leadership's Transformation of the Field," J.G. Hunt (1999) found the study of leadership moribund in the 1970's and the early 1980's filled with doom and gloom arguments about its triviality and lack of continued development. Hunt (1999, p.129) provided two quotations, which summarized the scene. In 1975, one leadership scholar quipped:

"Once I was active in the leadership field. Then I left it for about 10 years. When I returned, it was as if I had been gone about 10 minutes".

In 1975, John B. Minor declared:

“The heresy that I propose is that the concept of leadership itself has outlived its usefulness. Hence, I suggest we abandon leadership in favor of some more fruitful way of cutting up the theoretical pie.”

Hunt then argued that the field of leadership study and application was turned around by the appearance of the book “Leadership and Performance Beyond Expectations in 1985” (Bass, 1985) and its models, theory, experiments and surveys about the concepts and measurements of transformational and transactional leadership. The book built on James MacGregor Burns’ (1978) “Leadership”.

Another turning point at about the same time in the study of leadership was Robert House’s (1977) chapter entitled “A 1976 Theory of Charismatic Leadership”. It was a significant updating of Weber (1924/1947) who had introduced the concept of charisma to sociology and social science. House opened up the study of charisma to behavioral experimentation and survey research. Conger and Kanungo (1988, 1998) extended the applications of the concept of charisma. The period 1985 to 1990 saw the appearance of numerous related works by Bennis and Nanus (1985) and Sashkin (1988) on envisioning and Kouzes and Posner (1987) on transformational leadership. By 1992, Bryman suggested that the contributions from Burns to Kouzes and Posner were the “new leadership” and a new paradigm of leadership. Hunt (1999) supplied the evidence and rationale for conceiving transformational/charismatic leadership as a new paradigm.

Since its inception, research has demonstrated the utility of transformational leadership for increasing organizational satisfaction, commitment, and effectiveness, as well as the increased understanding of the dynamics of transformational leadership. There is a good fit of transformational leadership with the needs of leadership in the learning organization. But leadership can also be transactional. The good leader of the learning organization will be both but more transformational and less transactional. What are the behavioral differences?

As a biographer of both Franklin Delano Roosevelt and John F. Kennedy, James MacGregor Burns (1978) conceived of leadership as a continuum from transformational to transactional for Roosevelt and Kennedy were exemplars of both. As transformational leaders, Roosevelt and Kennedy could inspire and uplift their admiring publics with noble sentiments. As transactional leaders, they were consummate politicians: they exchanged promises for votes, traded favors, and could “wheel and deal” for partisan support. But, rather than being two ends of a continuum, transformational and transactional leadership are conceptually independent. Leaders can be high or low in both’ (Bass, 1999, p.5)

Transformational leaders raise the awareness of their constituencies about what is important, increase concerns for achievement, self-actualization and ideals. They move followers to go beyond their own self-interests for the good of their group, organization or community, country or society as a whole. In his inaugural address in the depths of the Great Depression, FDR proclaimed that “the only thing we

have to fear is fear itself." In his inaugural address in the midst of the Cold War, JFK declared, "My friends, ask not what your country can do for you, ask what you can do for your country."

As a Basque Nationalist leader, Jose Antonio Aguirre illustrated transformational leadership at its best. At 17, he joined the Basque Nationalist party and became its youth director. He was a star football player for the Athletic Club of Bilbao. His good looks and charisma made him a popular, natural leader. He was a great orator who could hold the attention of Basque crowds. He preached a gentler Basque nationalism. "Our nationalism" he declared, "should be universal...it should not be turned into a source of discord between peoples" (Kurlansky, 1999).

Transactional leaders cater to the self-interests of their constituencies by means of contingent reinforcement, positive in the case of constructive rewards, praise and promises for constituents' success in meeting commitments to the leader and/or the organization. Or, the reinforcement is aversive in the case of follower failure to meet commitments. Such aversive reinforcement to correct the follower includes negative feedback, reproof, or disciplinary action. Again, the same leaders provide examples of their transactional behavior:

"In his first hundred days in office, FDR introduced legislation endorsed by Congress providing immediate jobs for large numbers of the unemployed. Later on, he also tried packing the Supreme Court with six additional liberal judges when the Court declared The National Recovery Act unconstitutional. After JFK ordered a naval blockade of Cuba-bound Soviet long-range missiles that could reach American cities, Krushchev turned them around. But JFK also secretly promised Krushchev that in exchange for turning the missile transporting ships around, he would remove the U.S. missiles in Turkey as close to the USSR as Cuba was to the U.S." (Bass, 1999, pp. 5-6).

Components of Transformational and Transactional Leadership

Transformational and transactional leadership are not two ends of one dimension as Burns (1978) had posited. Rather, transformational leadership ratings of their immediate superiors by 198 U. S. Army field grade officers generated three independent factors in the items from Multifactor Leadership Questionnaire (Form 1). The items were judged by 11 panelists to be transformational and not transactional. Although factorially independent, the three factors of transformational leadership were: (1) *charismatic and inspirational* leadership (the leader envisioned a valued future, articulated how to reach it, set high standards, and set himself as an example which followers identified with and wanted to emulate); (2) *intellectual stimulation* (the leader encouraged followers to question assumptions and look at old problems in new ways to enable the followers to be more innovative and creative); and (3) *individualized consideration* (the leader treated each of her followers individually with different needs for support and development). (Bass, 1985). Although charismatic and inspirational leadership could not be separated in the factor analysis, conceptually they were seen as two highly correlated but different components of leadership behavior

The leadership ratings which the panelists had judged to be transactional were sorted by the factor analysis into positive and negative contingent reinforcement. Contingent reinforcement was familiar from behavior and learning theory. The positive reinforcement of *contingent reward*, reward or promise of reward was provided by the leader in exchange for followers meeting standards. *Management-by-exception*, (correction, negative feedback, reproof, sanctions or disciplinary action) was practiced by the leader for follower failure to meet standards. Based on Hater and Bass' (1988) findings, management-by-exception was further divided into whether it was *active* or *passive*. A *laissez-faire* factor also emerged. The laissez-faire leader was unconcerned, procrastinated, and avoided decisions. The laissez-faire leader was familiar from Lewin, Lippitt and White's (1939) boys club experiment.

Many factor analyses have been run with single samples of one sex or the other, with different forms of the MLQ, different types of analysis (principal components, partial least squares, etc.) with different items and scales omitted, and in different types of cultures, countries, and organizations (educational institutions, business organizations, health care institutions, and military organizations.) and diverse organizational levels. The original 6-factor structure of 1985 still survives as optimal requiring only minor modifications and can be measured with the Multifactor Leadership Questionnaire (MLQ) (Avolio & Bass, 1999).

"Usually, the transformational scales were found in each of many individual studies of single samples to be intercorrelated and positively correlated with contingent reward and negatively correlated with management-by-exception and laissez-faire leadership and many investigators searching for orthogonal solutions were quick to adopt a single factor of transformational leadership with several transactional factors. There was some merit in this for one inspected the intercorrelation matrix starting with the highest loaded scale of charisma and proceeding to line up the remaining scores as they systematically became lower in correlation with charisma and with each other, one could conceive of charisma as Spearman's *g*. and the remaining scale scores as specific factors." (Bass, 1999)

Avolio, Bass and Jung (1999) assembled 14 samples from investigators in the U.S. and abroad with complete MLQ data from 3100 respondents. All the respondents described their immediate superior on the 80-item MLQ. A 36-item revision emerged from the analyses. The 14 samples were sorted into an initial set of 1394 respondents and a cross-validation set of 1706 respondents. Confirmatory Factor Analyses (CFA's) tested an initial set of 1394 cases. The empirical fit was tested of each of 9 theoretical factor models for the 80 items for no factor structure, one general factor, two factors, up to nine factors. Some of the models for comparison were chosen with alternative solutions, which had been reported elsewhere for different single samples and forms of the MLQ (e.g., Bass, 1985; Bycio et al, 1995; Curphy, 1992; Den Hartog et al, 1997).

The best fit according to LISREL and Confirmatory Factor Analyses for the validation and cross-validation sets of samples was the six-factor model of 3 transformational and 3 transactional factors. Emerging were the same inspirational motivation, intellectual stimulation, individualized consideration, contingent reward, and active management-by-exception. But a *passive leadership* factor combined passive management-by-exception and laissez-faire leadership. A higher order

factor also emerged combining aspects of individualized consideration and contingent rewarding (Avolio, Bass & Jung, 1999).

When den Hartog (1997) factored the ILO, a Dutch leadership survey instrument containing many of the MLQ items, she also obtained a high average set of intercorrelations among the factor scores leading her to resort to second-order factor analyses which generated results paralleling Avolio, Bass and Jung's structure. Higher order factors of inspiration, individualized consideration and passive leadership emerged along with the specific scales of contingent rewarding and active managing-by-exception.

A comparable 6-factor structure also emerged as optimal for a military version of the MLQ using over 3000 respondents for 360-degree ratings of 144 platoon leaders and platoon sergeants of U.S. Army light infantry platoons (Bass, Avolio & Berson, (2000). Thus, one needs to understand that the components of transformational and transactional leadership are neither simple, opposite in relation, nor uncorrelated with each other. Factor analyses should be avoided that require orthogonality. Rather, oblique solutions and higher order factors should be sought.

The Full Range of Leadership. The Full Range of Leadership is a profile of the frequencies with which a focal leader displays the transformational and transactional components. Its scores include the components of transformational and transactional leadership. The individual scores of individual leaders are rated using the Multifactor Leadership Questionnaire (MLQ) by those above, below and at the same level in their organization. Empirically, the transformational factor scores correlate with the independently-based effectiveness of leadership more highly than do the contingent reward scores which in most circumstances are positively associated with effectiveness, but to a lesser extent.. In turn, contingent reward correlates more highly with effectiveness than does management-by-exception. Active management-by-exception varies from low positive to low negative correlation with effectiveness. Passive leadership is almost always negatively correlated with effectiveness. By definition, there is also a hierarchy in activity of leadership from passive to transformational (Avolio & Bass, 1991). Interactive data processing, automatic scoring and confidential feedback are available at the website <www.e-leadership.com>.

Every leader exhibits some frequency measured on a scale from 1 to 4 on each of the components and on each of the items contributing to the components. Ordinarily, improving leadership performance depends on reducing passive leadership and managing-by-exception and increasing the frequencies of transformational leader behaviors.

The Motivational Dynamics of Transformational Leadership

The *transactional* leader addresses the material needs of the employee; the transformational leader focuses on the self-concept of the employee and the employee's sense of self-worth. The transformational leader encourages the follower to build a self-concept that identifies with the leader's self-concept and mission. Striving for consistency, the follower is motivated to exert extra effort to match the follower's own self-concept and mission with the perceived expectations of the

leader and thereby raises his or her own sense of self-worth as a consequence. (Shamir, House & Arthur, 1993).

These effects increase as we move up the organizational ladder. Feedback about the self rather than about the task increases in importance as we rise in the corporate hierarchy according to a meta-analysis of 607 individual analyses (Kluger & DeNisi, 1996). Furthermore, the quality of the relations between the leader with an individual follower depends on the leader supporting the self-worth of the follower by showing confidence in the follower's integrity, ability and motivation, and attending to the follower's feelings and needs. This support for the follower's self-worth is more important to the quality of the relations with the leader than the expertise and leadership style of the leader (Dansereau (1995). This is consistent with Greenleaf's (1977) servant leadership and Block's (1993) leader as steward; the view that leadership exists to serve those led and the fulfillment of the needs of those served. In an organizational hierarchy, those served include supervisors, peers and subordinates. And so, 360-degree appraisals of a leader's performance are justified. The leader's generally positive mood appears to be inspiring. George (1995) observed that job involvement was greater for sales managers if they saw their own boss as positive in mood but transactional contingent rewards were also important for their performance.

Effects Elsewhere. Studies of the impact of transformational and transactional leaders were not limited to the United States or to particular organizational settings. Context was of importance, but the fundamental phenomena transcended countries and organizations (Bass, 1997).

For instance, in a different country and context, in Spain, Molero and Morales (1994) reported a study completed in 40 primary health care centers. The study focused on the transformational leadership of the center coordinators and their effects. Each coordinator was a leader of a team of family doctors, pediatricians, nurses, and clerks. The leadership was seen as significantly more legitimate in the eyes of team members in those centers in which coordinators earned higher MLQ scores in the transformational components. Team members found it more acceptable for the coordinators to organize, manage, control and evaluate their performance. There was less role conflict, better interpersonal relations and more feelings of autonomy when the coordinators were seen as transformational on the MLQ according to their associates.

Howell and Avolio (1993) demonstrated that the transformational, but not the transactional scores of department supervisors in a large Canadian financial institution predicted consolidated departmental performance a year later. Findings of greater effectiveness and satisfaction of subordinates under transformational leaders in organizations have ranged from a Chinese state enterprise (Davis, 1997), to Polish and Dutch firms (den Hartog, 1997). Garcia (1995) obtained similar results with American sales personnel and Dvir (1998) showed in a controlled field experiment in the Israeli Defense Force that training in transformational leadership made for more effective military officers when their units were followed up. Bass & Avolio (2000) obtained the same for U.S. Army infantry platoon leaders and sergeants.

Transformational/Transactional Leadership and the Learning Organization

I now propose to specify what each component of the Full Range of Leadership — of transformational and transactional leadership behavior — ideally contributes to the creation and maintenance of the learning organization. The future learning organization will need such leadership at all levels of the organization.

Inspirational Leadership. To become and maintain a learning organization, from the top on down, the Chief Executive Officer, assisted by consultation with subordinates, must articulate what is missing and the changes that are required to become a learning organization. A vision is shared about the style of leadership that is needed. The utility of mentoring and coaching is stressed. Also, in the vision, the importance of giving and receiving feedback, open communications, careful listening and trust are noted. A consultative mode of leadership is encouraged. Desired leadership role models begin at the top and are encouraged at each level below. The behaviors of the leaders at the top act as symbols of the new organizational culture.

Intellectual Stimulation. To bring forth the expert knowledge of the members of the organization, thinking is stimulated at all levels about the organization's objectives and the means to meet them. Airing of problems is encouraged. Stories about successful problem solving are passed on. Mechanisms for upward communication are developed. Creativity, innovation, calculated risk-taking, and careful experimentation are fostered.

Individualized Consideration. Individually considerate leaders take part in more acculturation activities. They treat each individual follower as having different developmental needs. They give and accept feedback as part of the learning process. They provide mentoring and coaching.

Contingent Reward. To foster organizational learning changes are introduced into the daily practices of the organization following suitable education and training efforts. Individuals and departments are praised, publicized and earn promotions and pay increases for trying and succeeding in introducing learning approaches into their everyday activities. Sometimes, even failing after trying is rewarded.

Active Management By Exception. Wherever possible, leaders at all levels are encouraged to practice transformational leadership and contingent reward in dealing with problems that arise. However, when this is not possible, they may use Active Management by Exception. They monitor their subordinates' performance and provided corrections, as needed.

Passive Leadership. Contraindicated for organizational learning is a leader waiting for problems to surface, i.e. passive managing-by-exception or abdicating the leadership role as in laissez-faire leadership. For organizational learning, a leader needs to be more proactive.

After appropriate deliberation and consultation, necessary changes in structure, processes and practices are made. The Organizational Development Questionnaire (ODQ) can be used to assess whether an organization's culture is more

transformational and/or transactional (Bass & Avolio, 1993) and thus indirectly determine whether the organization is a learning organization

The Information Revolution and Transformational/Transactional Leadership.

We are all aware of the marked changes and requirements brought about in industry and education by the Information Revolution. In the Digital Age, in school, pocket calculators replace memorization of the multiplication tables. Library assignments become searching the web. One master teacher on internet provides distance learning across the globe with talk-back features.

In business and industry, networking replaces chains of command. One message can be sent instantaneously to all members of the company. Monitoring and feedback can be automatic.

One industry in the United States has swung full circle and brought enormous changes in its strategic leadership and its leaders. In the early 1900's, AT&T's first CEO set its major goal as a regulated monopoly to provide customer service; cost was secondary, and profits were regulated. With AT&T's breakup into Baby Bells, profits were no longer guaranteed. With the advent of many telecommunications companies, the industry became driven up by the marketplace and technology. Survival required learning and adapting to the new order of things. An organization like IT&T, controlled tightly by Harold Geneen, was bound by internal rules and regulations. IT&T's managers faced monthly severe critiques of failures to meet goals. The firm could not learn to adapt itself.

Competitive advantage and continuous improvement become paramount. For survival, firms are required in which managers and employees are able to learn what is needed to adapt to the rapid changes in the market and in technology. A vision and strategy to provide quality and convenient customer service within cost constraints is not only seen now as a good in its own right, but provides important if not a firm's most important, competitive advantages in the marketplace. The new strategy helps direct the search for new technology as well as to rapidly apply it. Leaders, managers and employees need to be receptive to change, as well as how to search, invent, implement and evaluate necessary change.

Automation

In 1956, Leavitt and Whisler predicted that by the 1980's computer technology would replace middle management decision-making. Middle management has indeed shrunk in numbers proportionately. In successfully coping with the change, organizations must have an adaptable culture and value meeting constituents' needs. Adaptable new systems are introduced. Adaptable managers are favored. The new technology and automation result in early retirement and unemployment with or without reemployment, often at lower paying service jobs and in smaller companies. Nonetheless, today, because of technological advances and market driven opportunities, the new economy in the U.S. is faced with severe labor shortages.

Extensive investment in technology has been made. Some companies in the 1990's such as the Ford Motor Company were sufficiently adaptable so that they were able to avoid downsizing personnel when automation substituted for work in the office

and on the assembly lines. It learned how to transfer and train its employees to fill positions to handle the reorganized work. It was less expensive to terminate an employee without the skills to work with the new technology and hire a new employee with the skills, than to keep and train the old employee. (Cascio, 1995).

For other reasons, simply regarding automation and technology as black boxes with which to replace personnel does not provide for optimization of work and organization. Full automation is not usually the answer. What needs to be sought is learning how to optimize the human-technological interface. Sometimes there is too much human intervention with automated systems as in the case of the automated thermostatic controls on the steam boilers of the German cruiser Prince Eugen being taken in 1945 to Kwajalein as a H-bomb target. Fearful of blowing up the boilers, one of two U.S.Navy cardinal sins, the American captain assigned one seaman to monitor the thermostat and a second seaman to monitor the first seaman resulting in continuing over-correction.

At the other extreme is the introduction of over-engineered information systems without sufficient regard for the human user. For example, fully automated telemarketing and fully automated teleinterviewing may cause a lot of annoyed customers and poorer survey response rates than human callers. Nonetheless, the efficiency of the human callers can be enhanced with automatic dialing, automatic recording, keyboard tallying, prompting, etc. On occasion, Luddites may have the right idea about technological advance for the wrong reasons. The costs of technological advancement may be greater than the anticipated gains. This is particular so if we look for the hidden costs and unintended consequences. The organization and its leadership need to learn that automation brings problems with it. For example, automation complacency may set in. A systems-operator responsible for monitoring automated equipment as well as manual tracking will focus attention continuously on the tracking display and "look but not see" the automated displays like inattentive listeners at a lecture with blank stares on their faces.

Group decision support systems allow all the members of a group to be connected by computer to each other and to a central computer operated by an instructor. (Sosik, Kahai, & Avolio, 1998). Controlled experiments find that the quantity of ideas that can be generated by the team is enhanced by the decision support with simulated transactional leaders but the quality is better with simulated transformational leaders.

In sum, the introduction of new technology must be accompanied by opportunities for learning, revision and adaptation by the organization, its leaders and members. With its components of inspiration and intellectual stimulation, transformational leadership is like to contribute to the design and optimization of technology with its human users. In the same way, transactional leadership may be useful in team discussions about the trade-off between technology and workers in optimizing the work to be done.

Managers and technical staffs, sufficiently educated in information systems (IS), will still be needed to do the planning and implementation of systems of service which optimize the human and IS capabilities. I can't prescribe what the required mix

would be in each situation. Some, such as in the case of calling card dialing may work best with full automation; others, such as handling an irate customer may require a fully sympathetic human counselor. But I can tell you two ways in which personnel challenged by the need of their organization to survive and prosper in the Information Age can solve the problems of optimization of information systems (IS) and personnel to further align their own career interest with the interest of their organization. First, they can become more intellectually stimulating as transformational leaders of their team. Second, they can systematically review with their team and colleagues the obstacles and resistance to change and how to overcome them.

To intellectually stimulate their direct reports, they can, for instance, reformulate the specific problem, turn to metaphors or analogies, imagine alternative states widen, shrink or split context, or uncover and challenge hidden, deeply rooted opinions and assumptions. They can work with direct reports to avoid premature conclusions, match competencies with subparts of the problem, and play the Devil's Advocate, etc. They can do much the same with the colleague and supervisor.

To deal with resistance to change, they can answer such questions; is the need to change perceived and by whom. Who is the sponsor? How ready is the person, unit or organization for change? What motives underlie resistance? How will change be implemented, supported and maintained? Are they and their direct reports engaged in continuous learning to prepare to deal with the technological imperative they face? What needs to be done to shake up the vision of the organization's future state? How much have managers and organization bought into it? Will they have the opportunity to learn how to align their own career interests with the organization's vision of its future state? (Avolio & Bass, 1991).

Leadership with Some Elements in Common with Transformational Leadership

Many theories and models of leadership emphasize the work to be done and/or the relations between the leader and the led. Depending on circumstances, at times, transformational leaders should focus on the task; at other times, they should focus on their relations with their followers. These and other theories and models, which emphasize different aspects of leadership, share some commonalties with transformational leadership. These include democratic, empowering, participative leadership, leader-member exchange, strategic leadership, servant leadership, and leadership based on communication competence.

Democratic, Empowering, Participative Leadership

If we look to the future of leadership, especially in the fields of education, grass-roots mobilization, self-management and community affairs, there is a strong tendency to advocate that we must be democratic. Followers should be empowered to share in decision-making or make their own leader-free decisions. Furthermore, the distinction between leader and followers will be blurred. Leadership will be seen as a process of influence in which determining who is leading and who is following may be difficult to assess. Followers will take leadership positions as needed; leaders will become followers, as needed. The possibilities of instant distribution of

information to all by e-mail, electronic voting, conference calls, and videoconferencing, can enhance the tendency to share power and decision-making.

On the other hand, the proponents of democracy, empowerment and participation neglect the need to protect the minority from the dictatorship of the majority, the sometime need to deal with conflict by compulsory arbitration, and the need for rapid decision making and direction in emergencies. The differences in knowledge and skills may call for decisions by experts, which can be fully acceptable to novices. Heifitz (1994) uses the physician-patient relationship to illustrate the point. When it is a matter of technical knowledge about the patient's complaint, and needed are the physician's diagnosis, prognosis and prescription, the physician takes the lead; when the problem is about treatment, physician and patient should share in the decision, and when its a question of implementation, the patient needs to take charge.

As we said before, the transformational leader may be directive or participative. If creativity and commitment of followers are desired, then empowerment and participatory decision-making are needed. On the contrary, for accomplishing routine tasks, particularly of novices, directive leadership may be best, especially if the leader is experienced, knowledgeable, and esteemed by the followers. Portin & Shen (1998, p. 96) point out that ...

"New models of shared leadership and teacher empowerment have cast leadership responsibilities more widely, but the principal remains the singular individual at the nexus of leadership in the school. ...the increasing complexity of schools and school administration... reaffirms ...a mandatory responsibility for tomorrow's (school principals).

Leader-Member Exchange (LMX)

Focusing even more attention on the leader-follower relationship is LMX theory (Graen, 1976). While most leadership theories look at the relation between a leader and his or her group and its effects on the satisfaction, commitment and performance of the *average* member of the group, LMX examines the quality of the relation between the leader and each individual member. The leader's relation with one member can be good, while it is bad with a second member and neither bad nor good with a third member. Considerable experimentation and survey research have shown that the leader will have the most positive effect on the satisfaction, commitment and performance of the member with whom the relationship is best. Conversely, the leader will have the most negative effect on the satisfaction, commitment and performance of the member with whom the leader has the worst relationship.

The theory proposes the existence of an-ingroup membership with which the leader has good relations and an outgroup membership with which the leader's relations are not so good. The leader and the ingroup members perform their roles well. Communications between the leader and each ingroup member are good. Communications between the leader and each outgroup member deteriorates. One of many ways the ingroup-outgroup differential relationships form with the leader is when the leader asks some members to do extra-assignments, which are accepted, done successfully, and subsequently rewarded by the leader. Repetitions over time

result in these members forming an ingroup while those who reject the leader's continuing requests become members of the outgroup. Some members end up in the in-or outgroup because of the leader's stereotypes of what a good member should be like. Personality similarities and differences between the leader and the led may also affect the quality of the individual relationships. Whatever the reason, the quality of the relationships will have a strong effect on member satisfaction, turnover, commitment and performance. The future leader in the learning organization is likely to become familiar with and apply LMX theory. While at present, it is less well known than untested Covey's seven principles, situational leadership, the Grid, and other highly popularized approaches to leadership and followership, LMX has stood up well in 25 years of empirical testing. Recent findings link it to transformational leadership. As the LMX relationship becomes more mature, it moves from a transactional to a transformational relationship (Graen & Uhl-Bien, 1991) that can yield organizational learning.

Strategic Leadership

An international sample of 181 chief executive officers of business firms, service organizations and not-for-profit agencies were interviewed about what was needed for success. The interviews were conducted by consultants from Bain & Company and directed by Farkas and De Backerby (1996).

One or more of five alternative approaches to success were identified :1. the strategic formulation approach, 2. the human assets approach, 3. the expertise approach, 4.the box approach, and 5. the change-agent approach. All these approaches can contribute to organizational learning.

Strategic leadership is not limited to those at the top of the organization. "All employees can lead, not just the boss, because of the Information Revolution. The basis of leadership is shifting from position to knowledge. Anyone with critical knowledge that can alter (organizational) direction can show leadership. Leadership should be bottom up as well as top down." (Anon, 2000). Strategic leadership can make sense at all the levels of the organization although it keeps the organization head and planners busier than the rank-and-file.

Strategic Formulation Approach. With this approach, executives concentrate on systematically envisioning the desired future state for the organization and specifically laying out the plans on how to get there. In this process, they consult with managers, employees, suppliers, analysts, shareholders and customers. Other companies are visited. Academic scientists and technologists are questioned. Focus is on the future without neglecting to honor the past. Thus, four days before taking on the responsibility, a newly appointed CEO of Radio Shop, spent the time visiting many stores in the chain, questioning customers and sales clerks about what kinds of problems were faced and what improvements were needed

The Human Assets Approach. Here, emphasis is on people policies, programs and principles. The executive knows the capabilities of the personnel, and is systematic in the way he or she manages and leads. Quality training and performance

assessment with feedback are provided. People are empowered and rewarded for initiatives at all levels of the organization. Values of commitment and integrity are stressed.

The Expertise Approach. Using a specific expertise on which to focus the organization, the executive champions it. The particular expertise is identified as the competitive advantage of the organization and the expertise is spread throughout the organization. In this way, an organization becomes known for its capabilities in helping clients solve their problems.

The Box Approach. The executive builds a set of rules, systems, procedures, and values to control behavior within specified boundaries. The box is the primary focus of attention. In operations, financial controls and cultural controls take precedence. Every employee knows the rules and the consequences of ignoring them. Managers must meet specified financial goals or suffer the consequences of failing to do so. The box may be of the values espoused by the organization, which set the boundaries within which employees must stay. Managers and employees at Hewlett-Packard are indoctrinated with the H-P Way: quality, cost control, and customer satisfaction profit. Rules can be set in concrete for managing-by-exception. Nonetheless, other rules may direct learning, mentoring and coaching.

The Change-Agent Approach. The strategy here is to pursue continuous change for continuous improvement. This strategy represents the epitome of the learning organization. I would expect it to involve more transformational than transactional leadership although both would be needed.

"At Goldman, Sachs & Co. former managing partner, Steven Friedman spent ten years implementing this approach, turning a venerable banking firm with a reputation for conservatism into an international concern known for competitiveness...If you're not an agent of change, you're best a steward of something which is going to erode?" (P.13).

I once had a Dean who used this approach. When I first showed up to join the faculty of a prominent business school, knowing my credentials in executive education, he told me that I was to immediately come up with a new program for the first week of the 8-week executive education program. "I don't care what you do" he declared, "as long as you completely change the first week!" Any change will be good for the program."

Sometimes, the approach does not fit the situational requirements and failure results. Digital Equipment kept on with an expertise strategy when it should have adopted a strategy of change. Similarly, ITT's box strategy was too rigid in face of its rapidly changing environment. (Farkas & de Backerby, 1996).

Servant Leadership

Robert Greenleaf (1977), based on his experiences as an executive, developed a radical approach to leadership, which has spawned an endowed institute, a multitude of disciples and adherents, and many articles on the subject. Value-driven and performance oriented, servant leadership is seen by Farling, Gregory and Stone

(1999) as having many parallels with transformational leadership involving as it does the leader needing vision, influence, credibility, trust and service but it goes beyond transformational leadership in selecting the needs of others as its the highest priority. Indeed, it is close to the transformational components of inspiration and individualized consideration. . It stresses that to serve others is the leader's main aim. The transformational leaders strive to align their own and others' interests with the good of the group, organization or society.

Servant leaders have a "natural" feeling that they want to serve. They consciously make the choice to lead. The servant leaders have as concomitant goals helping others to grow as persons, to become wiser, healthier, freer, more autonomous, and more likely to become servant leaders themselves. The less privileged are benefited when the servant leaders succeed. The servant leader succeeds whenever the followers gain and achieve the goals set forth above.

Servant leadership offers future faculty in higher education the opportunity to transform higher education: by curtailing and redirecting ego and image, by setting up the faculty as first among equals, by creating reciprocal relations between teachers and students, by commitment and devotion to the academic discipline and by aligning the interests of the faculty and institution (Buchen, 1998).

Unfortunately, only anecdotal evidence is available to support the theory of servant leadership (Bowman, 1997). However, the strength of the servant leadership movement and its many links to encouraging follower learning, growth, and autonomy, suggests that the untested theory will play a role in the future leadership of the learning organization.

Leadership Based on Communication Competence

According to a recent survey of 151 employees in nine organizations, competent communications is required of the effective transformational leader. It also contributes to the quality of LMX relationships (Flauto, (1999).

The Communication Audit, a survey of communications among the leaders and their followers in an organization, was completed by ratings by 407 colleagues of focal leaders in an information technology firm, in a federal agency and in a social service agency. (Klauss & Bass, 1982}. The communication styles assessed had been shown to generate six factors: careful transmitting, open and two-way, frankness, careful listening, and informal. In the high-tech firm, being a careful transmitter, informal and frank resulted in being described as informative by colleagues. Being informal and open resulted in being seen as trustworthy. In turn, being informative and trustworthy correlated with being rated by colleagues as effective and satisfying as a communicator. Results were similar in the U.S.federal and social service agencies, except that frankness made no contribution in the social service agency.

The results speak for themselves. The future leaders of learning organizations, if they are not so already, need to examine whether they are careful transmitters, sufficiently informal with their colleagues, and not necessarily frank and outspoken at all times.

Looking to the Future in Educational Leadership

The leadership of the school principal is strongly linked to the success of the school.

"The school effectiveness research of the last twenty years affirms the role of principal leadership in school success.... Principals remain key individuals as instructional leaders, initiators of change, school managers, personnel administrators, problem solvers and boundary spanners for the school."(Portin & Shen, 1998)

Increase in Application of Transformational Leadership

Accompanied by an increasing of focus on leadership practices, the future education of educational administrator is likely to provide more practice with feedback with continued focus on democratic action and participative leadership (Shen, Cooley et al. 1999) However, I can foresee a rising interest in practice in transformational leadership coupled with the increasing empirical evidence of its efficacy in educational institutions.

Effects of Transformational Leadership. By now, as you might suppose, transformational leadership has similar effects on educational leaders such as school principals as it does on leaders in production and service organizations. This was confirmed in separate studies in North America and elsewhere of school principals MLQ-rated by their teachers.

Twenty- seven elementary, junior and senior high school principals in south central Minnesota were MLQ-rated by their 482 teachers. Significant correlations were found with effectiveness, teacher satisfaction, and motivation (Stone, 1992). MLQ ratings of 214 elementary school teachers of their 17 principals in a southwestern Michigan school district accounted for close to 50% of the differences in the social organization of their schools. Schools were higher in shared goals, teacher collaboration, teacher learning, teacher certainty and teacher commitment in those of the 17 elementary schools whose principals were higher rather than lower in transformational leadership (Evans, 1996). In the same way, using the Multifactor Leadership Questionnaire to appraise the behavior of principals seen by themselves and by their teachers, Ingram (1997) found that their teachers were more highly motivated if the principals scored higher in transformational leadership. In the Phillipines, Catanyag (1995) found that schools did a better job for their students when school principals were higher in their transformational scores on the MLQ. And in Singapore, Koh (1990) demonstrated that when secondary school principals were MLQ-rated as highly transformational by their teachers, teacher and student commitment, satisfaction and performance were significantly higher.

Indirect Evidence. Indirect evidence of the need for transformational leadership among teachers and principals was found in a survey in 29 universities of 332 prospective school principals pursuing certification. Near the end of their program in educational administration, 42% agreed that the primary purpose of schools was to develop students' individual interests and abilities (individualized consideration). 31 % saw as primary, improving society for the better (inspirational) and 20% saw as the primary purpose, maintaining social order and stability (transactional and

transformational) (Goodlad, 1994). Other indirect evidence is seen in a survey of 189 school principals in Wayne County, Michigan. They most strongly endorsed that they were intellectually stimulating. Thus, they agreed most strongly that they..."encourage the faculty and staff to experiment with new teaching methods and techniques" (Beyer & Ruhl-Smith, 1998).

The transformational/transactional leadership paradigm has caught on in educational circles in Australia and New Zealand (Lewis, 1996), supportive as well as critical. (Gronn, 1996). It is seen by some authors as useful in understanding and applying the transformational /transactional paradigm for promoting effective educational leadership. But it must be applied differently in education than in for-profit business and not-for-profit agencies (Collard, 1997). Furthermore, focusing educational excellence around the leadership of the principal is challenged by Lakomski (1996) who sees models of organizational leadership as less important for educational excellence than concentration on models of organizational learning. Cited are the different bases of research in educational and non-educational organizations.

The Need for Transformational School Superintendents. Here I can only speculate, but I would think that transformational superintendents would not only be more effective with their school boards and in their communities but also more likely to attract and retain principals and teachers to their district. This may become the most important role of the school superintendent because the current burden and obstacles to satisfaction and effectiveness in the school principal's position has led to serious shortages of school principals.

Conflicts with Non-Instructional Priorities. At a conference in Capetown, one South African principal remarked that:

"we're told we're now to be instructional leaders...and we know that is desirable, but, in fact, my most pressing priority each day is getting water to my school."
(Adams, 1999).

Adams suggested that principals are told everywhere that their role is to create and sustain an environment "that maximizes teachers' ability to teach and students' ability to learn". The classroom, thus, is a special kind of learning organization in which each participant, student and teacher, have as individual goals to teach and to learn.. Nevertheless, principals everywhere have auxiliary priorities ranging from school safety to satisfying parents. This is unlikely to change in the near future. Principals will continue to be overloaded with a combination of both important goals as well as trivial goals unrelated to furthering instruction. Also unlikely to change is "layering on new responsibilities unrelated to teaching or learning." This will continue to degrade their authority to bring about change in their schools and increase their accountability. Furthermore, they will continue to face new constraints by new government mandates. Their compensation will not match their total responsibilities, long hours nor the stresses and strains in the environment within which they must lead. Managerial responsibilities supplant their leadership activities. The consequences show up in the many requests by principals to return to

classroom teaching or to leave the school system. The unending paperwork, the increasing role of politics in the system and 15 hour work days rub salt in the wounds. The result is a serious shortage of qualified principals. (Adams, 1999)

"In Los Angeles, Ventura and Santa Barbara, California school districts, 26% of a sample of 38% who were credentialed and working as school administrators said they were thinking of quitting for many of the reasons cited above. Of the 62% credentialed and still working as classroom teachers or in doctoral programs, 46% felt they would be more dissatisfied as educational administrators than currently as classroom teachers, yet 66% of those credentialed as administrators chose administrative positions as career goals. They appeared optimistic about improvements in the administrator's role in the next five years. (Adams, 1999).

Grow Your Own.

Faced with the shortage of school principals in Broome and Tioga Counties, New York, our Center for Leadership Studies in Binghamton, in cooperation with the Broome-Tioga district superintendents and with New York State support, launched a Leadership Academy to conduct a program of voluntary assessment and training of the counties' teachers. Selected for training are those teachers who are seen as potential educational leaders, principals and superintendents. They will be assessed and trained in the Full Range of Leadership (Bass & Avolio, 1991)—the components of transformational and transactional leadership— as described earlier.

In various school districts in California, specialized training and a variety of improvements in the school system have been sparked by the shortage of principals. Academies have been established to promote the retention and professional growth of classroom teachers—future prospects for principalships. In-house talent is being identified and groomed for future leadership and administrative roles in Glendale and Santa Monica, California in a partnership with the Department of Educational Leadership and Policy Studies at California State University in Northridge. In the Capistrano School District, mentoring is provided for teachers who have been identified as prospective school principals.

Administrative internships have been added to nine elementary school staffs in Oxnard County to cope with the additional principal's responsibilities for safety, program quality, community and family needs. In Thousand Oaks, vice-principalships have been authorized for elementary schools with 700 pupils or more. (Adams, 1999).

The Future Educational Leader

If we apply to the educational scene, various prognostications found in the book "Leaders of the Future" edited by Hesselbein et al. (1996), we find interesting and sometimes contradictory contributions. In Chapter 5 of the Hesselbein et al book, Peter Senge calls for leaders with power and boldness. On the other hand, in Chapter 10, James Kouzes and Barry Posner feel that leadership is everyone's business and that shared values make a difference. And, in Chapter 3, Sally Helgeson (Chapter 3), agreeing with Kouzes and Posner, argues for grass roots leadership. Top-down power is obsolete in the knowledge organization and is being replaced by non-positional power as a consequence of the technological advances in

networking. Actually, those favoring leadership that points the way and those favoring participatory leadership are both correct (Bass, 1990). Sometimes, it is the bold and powerful leader who effectively demonstrates the initiative and responsibility for direction of the group and organization towards its goals. Other times, the group's and organization's progress depends on shared leadership, consultation and consensus about its means and ends before it can move forward to achieve its goals. Such participatory leadership is also indicated if commitment and creativity are given high priority. For this, John W. Work (Chapter 7 in Hesselbein) suggests that the true leader will need to be sensitive and understanding of the ethnic, cultural and gender similarities and differences within the work force. Consistent with what is needed in the learning organization, Rosabeth Kanter (Chapter 9) foresees the need for leaders to be learning-oriented, and comfortable operating across departmental and organizational boundaries. Especially applicable to educational learning organizations will be future leaders who serve as mentors, guides and cheerleaders. According to George B. Weber (Chapter 31, in Hesselbein), this will replace the command structure of superintendents, principals and teachers. Sara Melendez (Chapter 30), who has a career with a background in Education, sees the need for leaders of the future to be teachers and like transformational leaders and their followers the need to go beyond their self-interests for the "greater good". Again, consistent with the inspirational role of the transformational leader, in Chapter 27 of Hesselbein et al. (1995), William Steere, Jr. sees that the leader of the future will need to pay more attention to the ceremonial and spiritual roles of the leader.

Educational leaders, like leaders in any organizational setting will help promote excellence in their schools with good management, good social and interpersonal relations, and expert knowledge of their field. They also promote excellence and good role models of important relevant behaviors and beliefs. (Sergiovanni, 1990).

Educational leaders will need to be authentic in their efforts to inspire their teachers and students, to intellectually stimulate them and to show individualized consideration to their teachers, students and parents. In short, they will have to be transformational. But they also will have to be cognizant of the need for rewarding contingent on teacher and student performance as well as cognizant of the need to correct poor performance. In short, they will have to be transactional as well. They will have to be proactive rather than reactive. They will have to avoid shirking their leadership responsibilities.

Now head of the Drucker Foundation, Francis Hesselbein, herself, in Chapter 12 of Hesselbein et al., provides an inspirational message for leaders of the future. "Remarkable" challenges lie ahead for leaders of the future to lead their organizations into a "cohesive community of healthy children, strong families and work that dignifies the individual."

Summary

The future educational leaders of learning organizations will be transformational. They will be democratic in their relations with teachers and students but also know when they must accept their responsibilities to take charge. They will see themselves as change agents dealing with a multiplicity of problems faced by schools in the 21st century. They will help their teachers and students to learn to be

adaptable and prepared for the New World of globalism, diversity, the Information Age and the new economics. They will convert mandates and problems into challenges and opportunities.

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