



Journal of Excellence in Global Leadership

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About the Journal

Αρετή (Arete) Journal of Excellence in Global Leadership offers a platform that encourages theory development, theory-related discussion, and action projects from multiple disciplines with the aspiration of generating commentary and debate. Besides regular full-length submissions, Αρετή publishes teaching case studies, perspective-taking essays, posters and critical essays that contribute to the conversation regarding a problem or issue.

Arete is published in collaboration with the Global Leadership Institute, Saint Mary-of-the-Woods College, and the Private Academic Library Network (PALNI). It is a global, **peer-reviewed open-access journal** that publishes to a broad audience who appreciate the intellectual breadth of a global theoretical framework. Authors **are NOT charged a fee**. Please visit our [editorial team](#) if you have questions.

Current Issue

Vol. 4 No. 1 (2026): ἀρετή (Arete) Journal of Excellence in Global Leadership

Αρετή: A fundamental principle for Greek culture is ἀρετή (Arete). Arete is an ancient Greek word meaning excellence or virtue. To Greeks, Arete means excellence in reaching one's full potential.

Αρετή (Arete) is published in collaboration with the Global Leadership Institute and Saint Mary-of-the-Woods College, and The Private Academic Library Network of Indiana (PALNI). It is a global, peer-reviewed open-access journal that is published to a broad audience who appreciate the intellectual breadth of a global theoretical framework.

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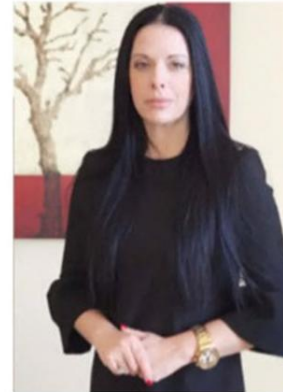
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Arete Featured in Library Showcase Week

Αρετή (Arete) Journal of Excellence in Global Leadership was selected by PALNI Open Press publications for the Library Publishing Coalition's inaugural Showcase Week, and we are excited to share that *Arete* has been selected as a publication highlight.



About Showcase Week

The Library Publication Showcase Week Task Force is excited to announce that the inaugural **Library Publishing Showcase Week** will be **February 23–27, 2026**! Library Publishing Showcase Week is a celebration of the creativity, innovation, and significance of library publishing programs.

Throughout the week, LPC will spotlight how library publishing supports authors, students, researchers, and scholarly communities by featuring impactful publications, partnerships, and services. Participants were selected from submissions across the LPC community and Αρετή (Arete) Journal of Excellence in Global Leadership will be featured.

[Link to Library Publishing Showcase Week.](#)

Editorial Fellowship Program

Ph.D. in Global Leadership students are invited to apply for an Editorial Fellow role with the editorial team of *Αρετή (Arete): Journal of Excellence in Global Leadership* and earn program publication credit by contributing to the improvement and visibility of this global, peer-reviewed, open-access journal. Students choose projects to work on including: section (training) for editors, website curators, social media coordinators, and/or helping to write AI Policy Guidelines. The Editorial Fellows gain practical application in scholarly publishing experience while advancing critical conversations in global leadership across disciplines. Two students were selected for Spring/Summer 2026: Arlie Paris and Dzungwenen Tyohemba. These two students worked diligently with the chief editor to develop an AI policy that guides editors, reviewers, and authors along with website content management. Katrina (Kat) Cunningham joined the Editorial Fellowship Program during the Fall/Winter 2026 session and has taken on the task of serving as a copyeditor. She has already earned the nickname, “Eagle eyes!.” Her other tasks include updating the website and preparing social media to invite potential authors.

Celebrating Excellence in Global Leadership

At the GLEE Conference in March 2026, the *Αρετή Arete Journal of Excellence in Global Leadership* was proud to announce the recipients of the 2026 winners of the prestigious Contribution of Excellence (COE) award. This accolade recognizes outstanding contributions to the field of global leadership, highlighting innovative research, impactful insights, and exemplary dedication to advancing leadership practices worldwide.

Winning Article:

“Perception of Success Factors of Women in Leadership Roles: An Exploratory Study of Gender and Glass Ceiling in China”

Authors: Hongmei Han, Ph.D., Mengdi Liu, Keith Miller, Ph.D., and Emerita Professor Phylis Lan Lin, Emerita Professor

[Link to More Information on the COE winners](#)



Lack of Women in Leadership Positions due to Gender Inequality

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Abstract

Background: Women are not achieving leadership positions in the United States as gender inequality still permeates society. **Objectives:** This article attempts to identify and analyse the main issues and hurdles that are preventing women from achieving significant leadership positions. **Methods/Approach:** Many different contexts and theories such as sticky floors, broken rung, leaky pipeline, glass treadmill, glass escalator, glass funnel, glass labyrinth, firewalls, glass ceiling, and glass cliff reflect the mechanisms by which women are obstructed from achieving leadership positions. Additionally, there are debated obstacles and constructs such as barriers and biases, microaggressions, disparate compensation, mentorship, the Great Breakup, denial, and lack of awareness which are also contributing to women being unable to reach leadership positions. **Results:** Gender inequality must be overcome for women to achieve leadership positions as it is a fundamental right of fairness and it benefits businesses for women to lead. **Conclusions:** The way to achieve gender equality and allow for women to lead is through the implementation of the Equal Rights Amendment. In addition, there must be expanded protections for equal rights through 1) expanding the scope and operation of the Gender Policy Council, 2) establishing a Secretary of Equality, and 3) implementation of Federal Regulations for equality with specific benchmarks to achieve.

Keywords: gender inequality, women, leadership, Equal Rights Amendment

Paper type: Research article

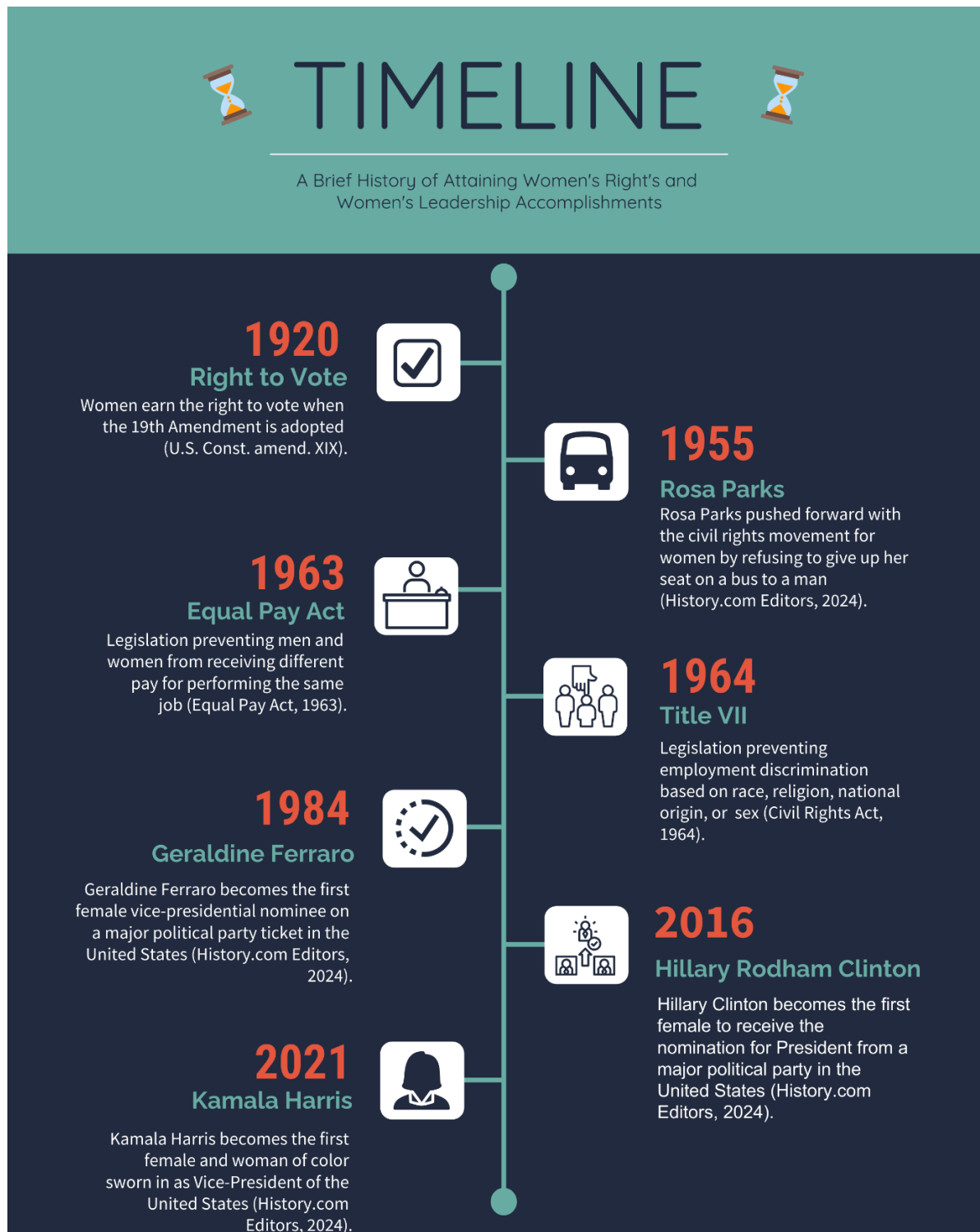
Introduction

Women are an essential part of society. They are the mothers who give birth to children, the sisters who support one another, and the matriarchs of families. Even with the inherent importance of women in society, they have not had an easy road. Time and again women have been forced to stand up and fight for their equality, their rights, and their voices. Women, though, are survivors and fighters who will continue to forge a path forward in their endeavours.

It has taken several years and multiple movements to get women to the position they are in today. Women did not earn the right to vote until the 19th Amendment to the United States Constitution was passed on June 4, 1919, and ratified on August 18, 1920 (U.S. Const. amend. XIX). During the 1950s women still had considerably fewer rights than men. It was during this era in 1955 that Rosa Parks stirred the embers of the civil rights movement by refusing to give up her seat on a bus to a man (History.com Editors, 2024). This small act of defiance, based on the inequities of men and women in society, was the beginning of unrest and protest in the United States. This movement would continue to build momentum over the next several years until the culmination in the 1960s. In 1963, the Equal Pay Act was signed into law (Equal Pay Act, 1963). This monumental law prohibits sex-based wage discrimination in the workplace for men and women performing the same job (Equal Pay Act, 1963). In 1964 the Civil Rights Act was signed into law (Civil Rights Act, 1964). This law, also known as Title VII, bans employment discrimination based on race, religion, national origin, or sex (Civil Rights Act, 1964). See Figure 1 for timeline of these notable events.

Figure 1

A Timeline of Women's Rights Progress and Leadership Milestones in the United States



Source. Author's Illustration (2025).

Discussion

Gender inequality (men are favored more than women) still exists and causes a lack of women in leadership positions (men are given leadership opportunities more often than women). To understand gender inequality and, in turn, to address why there is a lack of women in leadership positions, it is first necessary to understand the contexts and concepts that surround the inequitable structure that has perpetuated this situation. The following review will assess and evaluate these constructs to understand

how they contribute to gender inequality and the resultant dearth of women in leadership (see Table 1 for summary of relevant areas addressed herein).

Table 1

Breakdown of Concepts, Theories, and Studies of Gender Inequality

Concepts, Theories, and Studies	Definition
Sticky Floors	Women being stuck in the early parts of their careers in entry level positions (Shabsough et al., 2020).
Broken Rung	Missing or broken first steps in women's careers prevent them from ascending the ladders of success (Parmer, 2021).
Leaky Pipeline	Women enter the workforce in significantly higher numbers than end up in higher level positions as they are forced out along the way due to biases and barriers which force them out along the way (Stadler et al., 2021).
Glass Treadmill	Women are given trivial tasks and busy work to give the illusion that they are important and kept busy, yet they never make any progress in their career (Arendt & Nuru, 2023).
Glass Escalator	Men get fast tracked to higher positions, usually in women dominated professions (Iantosca & Lemke, 2022).
Glass Funnel	Takes into account that men and women exist together in the journey to leadership, but it shows how women can be flushed through faster due to biases and gender-based distinctions (Hedlin & Åberg, 2020).
Glass Labyrinth	Maze of challenges which are visible and invisible which women face (Ayesa et al., 2022).
Firewalls	Involves identifying the structure and triggers of discrimination along with how to address them in terms of all people (not just women) (Andersson et al., 2021).
Glass Ceiling	Invisible barriers that women encounter in their attempts to reach top career positions (Naguib & Madeeha, 2023).
Glass Cliff	Women who are finally given the opportunity at the highest career level only to encounter this at a time of crisis for the company or entity which essentially sets them up for automatic failure (Glass & Cook, 2019).

Source: Author's Illustration (2025).

Sticky Floors

One of the invisible barriers that obstructs women from advancing in their careers past entry-level positions is the 'sticky floors' (Shabsough et al., 2020). This issue arises in the early parts of women's careers and is indicative of a lack of ability to grow. While women are qualified, they are overlooked while their male counterparts are promoted over them (Shabsough et al., 2020). Women are left in "low-wage, dead-end and junior to middle-level positions" (Shabsough et al., 2020, p. 45). Thus, they are left at the ground level, stuck to the sticky floor. If women are not able to get their feet off the sticky floor, they will never be able to traverse up the 'corporate ladder.'

In their 2020 study, Shabsough et al. assessed the role of social networking through the relationship of entrepreneurial intention and sticky floor. This study looked at 294

women in the work environment (Shabsough et al., 2020). The notion was that women stuck in lower-level positions may be spurred to start their own businesses (Shabsough et al., 2020). The study found that as women's perceptions of the sticky floor phenomenon increase, so does their entrepreneurial intentions (Shabsough et al., 2020). Therefore, women who feel that they are being held back by the invisible barriers of the sticky floor are more likely to start their own business (Shabsough et al., 2020). This is showing that the women who are most feeling the sticky floor barrier are not likely to address this through their employer but by leaving their job.

Broken Rung

The broken rung is the barrier that women encounter in climbing the ladder to ascend to higher positions in companies and to attain leadership positions. This is the first step that women need to take in their journey up the preverbal ladder of success. The term 'broken rung' signifies that this early step is either broken or not there (Parmer, 2021).

This complication in the path to ascending the ladder makes not only the first step of a woman's journey difficult but it impacts the entire journey that a woman takes to upper-level positions (Parmer, 2021). As a result, women end up trapped in lower-level positions. The broken rung is the very first step up in the gender leadership gap (McFee, 2024). In terms of how the broken rung plays out in practice, for every 87 women who are promoted there are 100 men who are promoted (McFee, 2024).

Leaky Pipeline

The leaky pipeline is when women advance along the pipeline of career and leadership advancement at a slower pace than men. The reason is because along the way through the 'pipe' there are leaks which cause women to fall through the cracks and ultimately be at a disadvantage from the men who are also in the pipe (Stadler et al., 2021).

It was determined by Stadler et al. that there are unconscious biases and barriers to getting into, staying in, and progressing through the pipeline (2021). First, in entering the pipeline it was identified that there is leaking, among other things, because of work-life balance concerns, cultural contexts, and gender norms (Stadler et al., 2021). In terms of staying (working) in the pipeline there were multiple barriers identified which included perception of balance of work versus reward and caregiver responsibilities (Stadler et al., 2021). Finally, and significantly, the barrier to advancement includes lack of role models, confidence, mentorship, networking, and other issues (Stadler et al., 2021).

DeVona and Weiner also pursued study of the leaky pipeline in their 2024 study. Their results were akin to Stadler et al. but expanded. DeVona and Weiner's results suggested that the leaky pipeline continues to perpetuate because of three factors 1) representation, 2) mentorships, and 3) hiring biases (2024). Representation involves not only seeing other people like yourself who are in leadership positions but those people in leadership positions being able to see you (being seen) (DeVona & Weiner, 2024). If men are all that are seen it inhibits women's abilities to 'see' themselves in leadership positions (DeVona & Weiner, 2024). Additionally, being seen is not always afforded to all persons if they do not look like the people who are leading (DeVona & Weiner, 2024). Mentorships allow for the opportunity to learn, build relationships with influential leaders, and gain insight (DeVona & Weiner, 2024). Mentorships provide a

level of learning that is not readily available to all persons and provides a distinct advantage to mentees (DeVona & Weiner, 2024). In a situation wherein there is an inordinately high number of male leaders (lack of women leaders) it would make it increasingly more difficult for women to engage in these mentorship relationships. Finally, hiring bias is when people favor those individuals who share similarities to existing and prior leaders (DeVona & Weiner, 2024).

Glass Treadmill

The glass treadmill is when women are given tasks and kept 'busy' but not with meaningful jobs and opportunities. Therefore, women are continuously moving but not forward or upwards in their career trajectories as they remain in one place as if on a treadmill (Arendt & Nuru, 2023). The Arendt & Nuru study looks at the gender gap which exists with men and women in leadership (2023). The investigation involved interviews with 31 women which resulted in three themes contributing to the lack of advancement of women in leadership which includes: "disconnects between mentorship needed and mentorship received, disconnects between leadership opportunities and "opportunities," and disconnects between advice given and action taken" (Arendt & Nuru, 2023, p. 369). As a result, the glass treadmill was thus offered as an explanation of the lack of advancement of women (Arendt & Nuru, 2023).

Glass Escalator

The glass escalator exists when men are expedited to leadership positions in fields which women hold most positions (Iantosca & Lemke, 2022). This upward mobility advantage for males puts women at a disadvantage in areas where they have a strong presence. The resultant catapulting of men upwards to the upper leadership positions essentially places them on an escalator that moves quickly ahead of women who are left to climb up the ladder.

Iantosca & Lemke performed a study that looked through the lens of gender inequality of high school counsellors (2022). This study included in-depth interviews were conducted with 20 counsellors which determined that the role of gender in leadership expectations was evident (Iantosca & Lemke, 2022). In the instance where both men and women did not want to pursue leadership positions it was found that men encountered both internal and external pressure to take on such positions and women only received minor encouragement to pursue leadership positions (Iantosca & Lemke, 2022). These results continue to bolster the traditional gender identity roles of men and women (Iantosca & Lemke, 2022). Additionally, the study showed the glass escalator in practice.

The reason for the continued permeation of the glass escalator includes the systemic problems with power dynamics seen between men and women coupled with engrained gender stereotypes (Clerkin, 2024). This phenomenon is continually seen in leadership positions across the fields but especially in areas which are female dominated (i.e., nonprofits) (Clerkin, 2024). Even with all evidence to the contrary the gender perceptions that men are more competent than women drive the perpetuance of the glass escalator (Clerkin, 2024). Therefore, even if there are a multitude of qualified female candidates, men will be sought out and promoted thus resulting in the glass escalator (Clerkin, 2024).

Glass Funnel

The glass funnel is used to describe the problems with career advancement while considering the constructs of gender segregation and discrimination (Hedlin & Åberg, 2020). This term was coined in Hedlin & Åberg's study functions as a dynamic depiction of the issues as opposed to previous static depictions of the glass escalator and the glass ceiling (2020). The funnel is a mechanism in which both men and women exist in together. Even though women may be flushed through the funnel faster than men, the glass funnel construct accounts for men being present and adding the complexity that gender inequality does not occur in a vacuum (Hedlin & Åberg, 2020).

Glass Labyrinth

The glass labyrinth is, for women, a collection of "seen and unseen challenges to leadership engagement and progression when compared to men" (Ayesa et al., 2022, p. 155). It is a labyrinth because it is a complex and tedious journey to the other side where there is something important waiting (i.e., leadership positions for women). This journey through the labyrinth is complex and not straightforward. Women are already on a tedious journey to get to their desired leadership positions. Therefore, the addition of the seen and unseen obstacles within the labyrinth amounts to additional hindrances on an already difficult journey.

Ayesa et al. endeavored to explore the glass labyrinth in the context of gender composition in Australia and New Zealand regarding radiology leadership (2022). This study was undertaken due to a lack of gender diversity in radiology leadership (Ayesa et al., 2022). The study reviewed and assessed the composition of multiple radiology councils to determine the gender composition (Ayesa et al., 2022). What was determined was that there was a severe lack of women's representation (Ayesa et al., 2022). The reason for this is complicated and complex but it was determined that glass labyrinth is contributing to this deficit (Ayesa et al., 2022). To overcome this there must be multifaceted strategies which will take time to implement but must be addressed (Ayesa et al., 2022).

Firewalls

The term 'firewall' is a recent one which was coined so that people could see the structural character of discrimination patterns, find the triggers of discrimination, and address them (Andersson et al., 2021). This came about in response to the traditional issues in women's career trajectory problems which include glass ceiling, sticky floors, and labyrinths. These terms have a distinctly female connotation to them. Therefore, the term firewall originated to have a more neutral grounding as opposed to its predecessor terms (Andersson et al., 2021).

Andersson et al.'s study involved 13 women and five men in the Swedish trucking industry who were interviewed (2021). It was found that using the firewall metaphor was helpful in identifying different steps in processes which are problematic (Andersson et al., 2021). It also drives home the point that framing the issue and the language that is used to discuss these matters is important.

Glass Ceiling

"The term "glass ceiling" typically refers to systemic gender inequality in the public sphere, which stems from stereotypes and prejudices against women in positions of

authority” (Naguib & Madeeha, 2023, p. 2). The glass ceiling is the most well-known construct in terms of the challenges that women face in their career progressions. These unseen barriers which prevent women from reaching top positions (Naguib & Madeeha, 2023). This has been long been discussed and documented in the Western countries (including the United States), but this issue prevails in all corners of the world (Naguib & Madeeha, 2023).

Naguib & Madeeha attempted to bring this topic into view in the public sector of Qatari by conducting interviews (open-ended and semi-structured) (2023). The group was composed of 45 participants of which 67% were women and 33% were men (Naguib & Madeeha, 2023). The main thrust of the study was to provide meaningful contribution to the work on gender inequality (Naguib & Madeeha, 2023). What Naguib & Madeeha found, though, was that “concealed power dynamics, gender biases, and work-family struggles...hinder women’s access to leadership positions...” (2023, p. 8). Additionally, even with the positive attitude of the Qatari public sector regarding women gender bias is still permeating through and curtailing women’s advancement in careers (Naguib & Madeeha, 2023).

Glass Cliff

The glass cliff refers to the situation in which women are, finally, ascended into the pinnacle or upper management positions only in times of strife or great discord of the entity or company (Glass & Cook, 2019). In this situation these women leaders are left to deal with an already bad circumstance on their own. This tendency to only promote women to these positions in such treacherous times sets them up for failure.

Glass & Cook venture through the previously overlooked issue of the cost of women (and racial/ethnic minority leaders) in their career trajectories as they venture to the glass cliff (2019). It was posited that it is because of the choices, decisions, and priorities of these women that their careers lead them directly to the cliff (Glass & Cook, 2019). This trajectory, though, comes at a price. The study involved interviews and discussions with 33 leaders (Glass & Cook, 2019). It concluded that the tax which is paid by these women includes “perfection standard of performance, fear of career derailment, and performance fatigue.” (Glass & Cook, 2019, p. 649).

Key Debates and Controversies

In addition to the key concepts and theories identified above, it is also necessary to understand the key debates and controversies surrounding gender inequality and the lack of women in leadership. These are the debated constructs which people question whether they are relevant to or exist as an impediment to women. The following are a few of the main debates and controversies currently surrounding the lack of women in leadership due to gender inequality (see Table 2 for summary of relevant terms).

Table 2

Breakdown of Key Debates and Controversies

Key Debates and Controversies	Definition
Barriers and Biases	Conscious or unconscious stereotypes, perceptions of what leadership should look like (including identity and traits) along with a resultant lack of training can be barriers and biases to women in attaining leadership positions (Barkhuizen et al., 2022, p.).
Microaggressions	Small but impactful dismissive or hurtful actions of people and management which disrupt the work and advancement of women (Field et al., 2023).
Disparate Compensation	Women earning less than men in the same positions (England et al., 2020).
Mentorship	Lack of women to serve as mentors (i.e., providing guidance for personal and professional goals and needs) as there is a lack of women in upper leadership positions (Georgousakis & Vassallo, 2023).
The Great Breakup	Women leaving the workforce at higher rates (due to multiple factors such as lack of DEI training, microaggressions, compensation, and work-life balance) than they can be replaced (Corbett, 2022).
Denial	Companies believe that gender inequality exists but that it is not an issue at their place of business or with their employees (King, 2020).
Lack of Awareness	People do not see gender inequality as they are not paying attention and until they see what is truly happening around them the situation will continue to get worse (Scherpereel, 2023).

Source: Author's Illustration (2025).

Barriers and Biases

There exist multiple barriers to women from attaining leadership positions which arise from stereotypes which may lead men to believe that women are not qualified for positions. There are also barriers in the form of biases which exist as to what leadership traits *should* be exhibited by candidates. These traits are generally masculine and thus lean towards men and not women candidates. These biases (conscious or unconscious) and barriers are forms of discrimination which work to make women seem unqualified and thus thwart their opportunities for leadership positions.

Barkhuizen et al. looked at the gender imbalance in the workplace and the factors which contribute to women's inability to ascend to positions as senior business leaders (2022). This analysis was undertaken through a qualitative study of nine women who made significant strides in their professions within the South African business context (Barkhuizen et al., 2022). The goal was to find what inhibited women from career advancement. The study found six factors that impede women from advancing in their careers which include "societal perceptions and stereotypes, a lack of mentorship, masculine corporate cultures, leadership identity distortions, inadequate training and

development and poor work-life balance” (Barkhuizen et al., 2022, p. 1). This study provides practical and managerial implications for organizations to use to provide a better environment for women and their career advancement.

The first factor was that of societal expectations and stereotypes. This comes because of society’s belief as to the roles of men and women (Barkhuizen et al., 2022). For women this includes care and nurturing along with taking care of the family unit (Barkhuizen et al., 2022). Additionally, gender stereotypes were found to shadow women with doubt as to their ability to perform in male associated roles (Barkhuizen et al., 2022).

The factor regarding corporate culture and practices was cited as the third most constraining in Barkhuizen et al.’s study (2022). The two biggest issues which curtailed women’s advancement were hostile corporate culture and gender equity practices were not enforced (Barkhuizen et al., 2022). It was found that even if there were policies regarding gender equity practices there were no consequences for failure to follow them (Barkhuizen et al., 2022).

The culture of the companies being masculine in nature led to the leadership identity distortion factor (Barkhuizen et al., 2022). This is because women felt constrained if they were to act as themselves or in a feminine manner. Thus, to break through to leadership positions they had to take on a more masculine persona which was not true to their identity but merely a means to end to achieve the position (Barkhuizen et al., 2022).

The final two factors are inadequate training and development and poor work-life balance (Barkhuizen et al., 2022). The training was either not available, or it was of no effect to assist women in attaining promotions (Barkhuizen et al., 2022). Work-life balance was seen as constantly at odds with both not being able to be exacted in the same sphere because of the demands of work conflicting with family life (Barkhuizen et al., 2022).

McKague et al. addressed the gendered challenges faced by the community health workers with social enterprises in Africa (2021). Through individual interviews and focus group discussions of 175 total individuals (106 women and 69 men) it was determined that female community health workers faced seven gender-based constraints that were not a barrier to males which included “1) higher time burden and lack of economic empowerment; 2) risks to personal safety; 3) lack of career advancement and leadership opportunities; 4) lack of access to needed equipment, medicines and transport; 5) lack of access to capital; 6) lack of access to social support and networking opportunities; and 7) insufficient financial and non-financial incentives” (McKague et al., 2021, p. 1). As to the lack of career advancement and leadership opportunities, the reason for this was because of (a lack of) education, training, and sociocultural norms (McKague et al., 2021). Additionally, the females interviewed cited a lack of ability to connect with each other or other leaders (i.e., mentoring, coaching, and female-to-female connections) (McKague et al., 2021).

The issue of gender bias in leadership selection was addressed in Player et al.’s 2019 study. Specifically, the study differentiated between males and females using leadership potential and leadership performance (Player et al., 2019). What was found

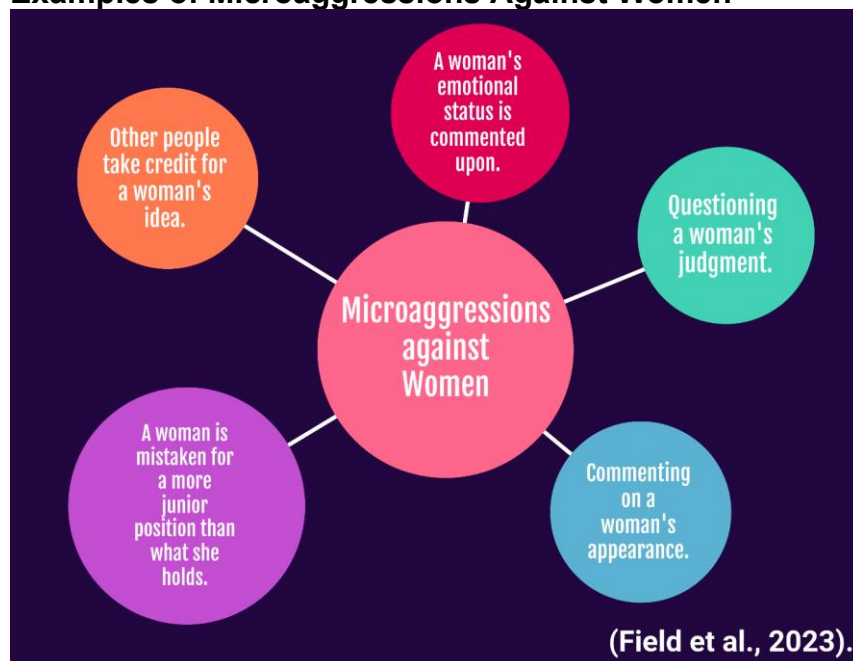
through two experiments was that male leadership potential was valued more than performance, but female candidates were preferred when they showed leadership performance (not potential) (Player et al., 2019). Therefore, women have an inherent disadvantage in organizational hiring due to the bias shown for leadership potential positions (Player et al., 2019). Given that leadership potential is a trait which is preferred by most employers' women would be automatically at a disadvantage, and thus a barrier, in all hiring processes due to the association with males having the leadership potential (Player et al., 2019).

Meng & Neill addressed the issue of inclusive leadership in relation to the realm of public relations through the means of an online survey (2021). This was an important endeavour as women in public relations hold an overwhelming number of positions (70%) but only 30% of leadership positions (Meng & Neill, 2021). Meng & Neil discuss the use of inclusive leadership into the framework of public relations for working through the gender inequality issues and to empower women (2021). Inclusive leadership is characterized by "leaders' openness, accessibility and availability within the organizational environment" (Meng & Neil, 2021, p. 152). It was found that organizations which employ inclusive leadership will get benefits at many diverse levels and thus relieve a barrier to women (Meng & Neil, 2021).

Microaggressions

Microaggressions are perceived to be trivial instances which are thought to have a small impact (Field et al., 2023). These things, though, have a macro effect on places of work and on women (Field et al., 2023). These issues cause women to not feel safe in their jobs and at work (Field et al., 2023). Additionally, these microaggressions cause 78% of women to "self-shield at work" which means that they alter their appearance or the way they act to feel safe (Field et al., 2023, p. 17). Some examples of the microaggressions that women encounter are listed in Figure 2.

Figure 2
Examples of Microaggressions Against Women



Source: Author's Illustration (2025).

These microaggressions are the cause of many adverse outcomes and staggering statistics (Field et al., 2023). Women who experience microaggressions are (1) “4.2x more likely to almost always feel burned out,” (2) “3.3x more likely to consider leaving their company,” and (3) “3.8x more likely to feel they don’t have an equal opportunity to advance” (Field et al., 2023, p. 20). These microaggressions which do not appear to be bothering companies are a million little things that taken together are causing large scale disruption and problems for companies and women.

Disparate Compensation

In looking to determine if gender inequality is still permeating society and certain industries a relevant factor to review is the gender pay gap (England et al., 2020). Over time it has been seen that, while working the same positions, women earn less than men across the board (England et al., 2020). These discrepancies and disparities are pervasive in all industries including leadership. Even though there have been some strides made over the years, this gap remains (England et al., 2020).

England and his team looked at the wages of men versus women from the 1970s through 2018 (2020). While the pay gap between men and women has reduced over time it still exists (England et al., 2020). Additionally, progress to further close the pay gap has stalled in recent years (England et al., 2020). As of 2018, women earn (at the median) 83% of what men make (England et al., 2020). This disparate compensation is not only an indicator but a symptom of the gender inequality which exists in society and must be addressed.

Mentorship

Lack of mentorship has been identified over multiple areas and articles as a factor which has held women back and led to lack of women in leadership positions. In addressing this issue, it is first necessary to identify what mentorship is and is not (Georgousakis & Vassallo, 2023). Mentorship is not supervision in which someone tells another person what to do (Georgousakis & Vassallo, 2023). Mentorship is a professional relationship in which a mentor provides a mentee with guidance based on the mentee’s personal and professional goals and needs (Georgousakis & Vassallo, 2023).

It has been asserted that inspiring women can and do serve as role models for women in the same field (Mekahli, 2021). This has been especially prevalent in science as, globally, only a third of researchers are female (Mekahli, 2021). They also sustain gender discrimination and lack access to opportunities (Mekahli, 2021). These issues, it has been posited, could have been thwarted with the recognition and visibility of mentors and role models (Mekahli, 2021). Women such as Elizabeth Blackwell (first woman doctor) and Marie Curie (Nobel prize winning physicist) opened the doors to opportunities for women (Mekahli, 2021). Without such representation and modelling for other women it is hard for up-and-coming women to see what lengths they can achieve.

The idea and promotion of mentorship was also posited in Hill, et al.’s study regarding women in superintendency positions. Since the United States Public Education system is still not a formidable place for women in upper leadership roles, including superintendents, Hill and her team performed a qualitative study of 36 women in

various points of their career and leadership track (Hill et al., 2020). The data was then analyzed using Life Course Theory. The finding was that “life circumstances precluded the existence of choice for those women who failed to pursue the superintendency” (Hill et al., 2020, p. 189). The final determination is that to tip the gender imbalance in the direction of women it will be necessary to delve into the strategies and choices made by the women who have surpassed the challenges and are thriving as superintendents (Hill et al., 2020).

The Great Breakup

Women are leaving their jobs at a rate which is faster than women can be promoted into those positions (McFee, 2024). This is what is referred to as the *Great Breakup* (Corbett, 2022). While it may appear that women are leaving the ‘workforce’ what they are really doing is breaking up with their companies due to working conditions (Corbett, 2022). Women are not getting the respect, working conditions, and other things that they need from companies and as a result women are leaving. There are several factors which have influenced the breakup including microaggressions (discussed above), lack of compensation for diversity, equity, and inclusion (“DEI”) efforts, lack of manager training, and work-life balance (Corbett, 2022).

One of the things contributing to this exodus is the additional work women are taking on which is not being compensated (Corbett, 2022). There is a big push for DEI initiatives by companies, and this is being answered by women stepping up to add in these strategies (Corbett, 2022). This work, though, is not being recognized or rewarded by companies thereby this work, which the company expects on top of the normal workload, is unpaid work for women to do (Corbett, 2022).

Another factor is belonging. Managers are essentially the gatekeepers of workplace culture and having a good manager can be the difference of staying or leaving a job (Corbett, 2022). There is a growing issue of how well managers are equipped for this position through their training (Corbett, 2022). There is a deficit in the understanding that managers have in making effective decisions and balancing needs of employees in work environments especially considering remote and hybrid work options (Corbett, 2022). All this amounts to a deficit in training which companies must address.

Finally, women under the age of 30 are not suffering the environments that women of the past have weathered. These women are likely to leave if there is no work-life balance (Corbett, 2022). Two-thirds of women under 30 would be interested in advancing in their careers so long as their leadership is reflecting work-life balance (Corbett, 2022). Additionally, 58% of these women say that moving up in their careers is important (Corbett, 2022). These women are eager to advance but they are also cognizant of what the working environment looks like, and they are not willing to sacrifice what they hold important for their careers.

Denial

King frames the lack of women in leadership matter not as a representational issue (i.e., more women and less men) as that will only deflate men and make women feel like token hires (2020). Instead, to approach and address the lack of women in leadership issue King asserts that companies should strive to “create a culture that values, rewards, and supports individual difference” (2020, p. 3). Through culture of embracing and valuing difference companies will inherently value equality which will

lead to both men and women ascending to and maintaining leadership positions (King, 2020). King asserts, though, that the reason that this is not how companies are leading and approaching the issuing because of one reason, denial (2020).

People generally acknowledge that problems exist, and that gender bias is a real issue (Kelan, 2020). Kelan sets forth that these same people, though, believe (1) 'not here' (aka these kinds of issues happen elsewhere), (2) it is all in the past (this is not a modern age issue), (3) it is a non-issue because women have benefits at jobs (past efforts to combat gender inequality make it so women can succeed), and (4) they ignore it (they see these issues occur but they explain it through things other than gender inequality) (2020). This stance on the issue adds up to denial which is holding women and companies back from making progress. Unless and until companies stop denying the existence and magnitude of these issues of gender bias, gender inequality, and gender fatigue women will continue to be held back and not succeed (Kelan, 2020).

Lack of Awareness

While denial is people actively debating that gender inequality exists, lack of awareness is where people are not even engaging in the conversation and therefore have no idea that there is an issue with gender inequality. To effectuate change and get more women into leadership positions it is necessary to start with awareness. Awareness exists on the individual, organizational, and industry wide levels (Heffernan & Kihl, 2024). Awareness is also a continuum that runs from low (does not see a problem and believes that the system is fine), intermediate (knows there is a problem but does not know how to effectuate change), and high (knows there is a problem and work to make change) (Heffernan & Kihl, 2024).

For gender equality to be achieved people, organizations, and industries must stretch their awareness to high awareness. To achieve gender equality there must be both a covenant of the individuals along with the organization circumstances to reach the goal (Scherpereel, 2023). Currently, though, there is no requirement for individuals, organizations, or industries to stretch their awareness to the high end of the scale because there are no consequences.

Gaps in Existing Knowledge

The literature available on gender inequality and the problems females face is extensive (Belingheri et al., 2021). There are all kinds of research into the different types of barriers, transgressions, inequalities, etc. that exist which inhibit women from ascending to leadership positions (Belingheri et al., 2021). What is lacking, overall, are effective solutions to solving the problem of gender inequality and the gender bias which permeates society (Belingheri et al., 2021).

In terms of the problem there needs to be a clear understanding of what the issue is and how to fix it. In looking at this it is necessary to differentiate the terms inequality, equality, equity, and justice. Inequality is when people do not have the same access to possibilities and things (Juda, 2022). Equality is when everyone has the same access to possibilities and things (i.e., everyone receives the same treatment) (Juda, 2022). Equity is focused on individual fairness by giving specific and customized advantages to those who need additional support (Juda, 2022). Lastly, justice is about fixing the system so that fairness is universal to everyone (Juda, 2022).

To effectuate change the discriminatory and unjust system must be reformed (DeVona & Weiner, 2024). “To enforce women empowerment...we need to implement justice...” (Farrukh & Baqai, 2023, p. 223). Justice will combat the system issues that ridicule women and their attempts to reach leadership positions. Justice comes in the form of laws. Laws that have been implemented over the years include:

1920 – Ratification of the 19th Amendment (giving women the right to vote) provides that “the right of citizens of the United States to vote shall not be denied or abridged by the United States or by any State on account of sex” (U.S. Const. amend. XIX).

1963 – Equal Pay Act, amendment to the Fair Labor Standards Act of 1938 prohibited gender discrimination for men and women performing the same job in the workplace and states in relevant part “prohibit discrimination on account of sex in the payment of wages” (Equal Pay Act, 1963).

1964 – Title VII of the Civil Rights Act of 1964 was enacted to ensure overall equality in the workplace and prohibited discrimination against employees based on “race, color, religion, sex, or national origin” (Civil Rights Act, 1964).

1972 – Educational Amendment of 1972 (Title IX) was a monumental law enacted to ensure that “[n]o person in the United States shall, on the basis of sex, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any education program or activity receiving Federal financial assistance” (Title IX of the Educational Amendments, 1972).

1978 – Pregnancy Discrimination Act of 1978 amended Title VII of the Civil Rights Act of 1964 and provided that “[o]n the basis of sex” employers are prohibited from using “pregnancy, childbirth, or related medical conditions” to discriminate against women in all employment decisions such as hiring, promotion, and suspension (Pregnancy Discrimination Act, 1978).

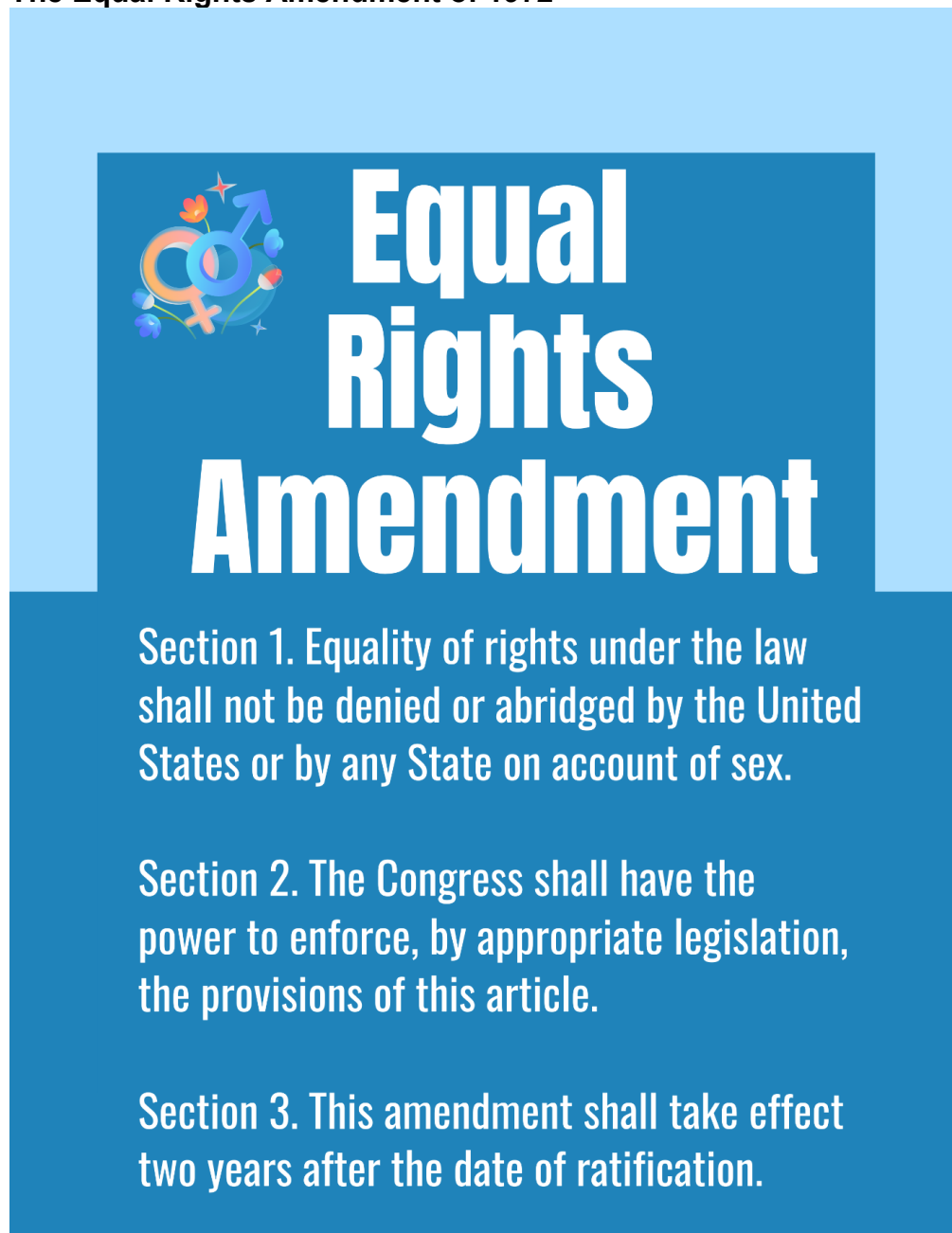
With all these laws on the books and in effect how are women not already afforded equality? The laws and protections which have been afforded above are a good start but as can be seen through the cited research herein, women are not afforded the same equality as men, and this is manifesting itself in the lack of women in leadership positions. What is missing in the United States which has not been assessed, and which would evolve the equality fight is an Equal Rights Amendment to the United States Constitution.

The Equal Rights Amendment

Work has been occurring for the last 100 years to add an amendment to the United States Constitution guaranteeing equal rights (Columbia Law School, 2021). This battle originated in 1923 shortly after the ratification of the 19th Amendment to the United States Constitution which gave women the right to vote (Columbia Law School, 2021). Although simple in language, the Equal Rights Amendment implications would have far reaching repercussions (Columbia Law School, 2021).

In 1972 Congress passed the Equal Rights Amendment (Columbia Law School, 2021). The text of such amendment was “Equality of rights under the law shall not be denied or abridged by the United States or by any State on account of sex” (Columbia Law School, 2021, para. 8). See Figure 3 for full text of the amendment.

Figure 3
The Equal Rights Amendment of 1972



Source: Columbia Law School, 2021; Author's Illustration (2025).

To finalize the amendment, it had requirements imposed by Congress so that it would take effect two years after it was ratified by 38 states (Columbia Law School, 2021). In 1973, 30 of the 38 states had ratified the amendment (Columbia Law School, 2021). There was a seven year extension of time implemented to achieve the ratification requirements (Columbia Law School, 2021). At the end of the ratification time limit imposed by Congress, the Equal Rights Amendment had obtained ratification by 35 states (Columbia Law School, 2021). The amendment, though, was still three states short (Columbia Law School, 2021). At this time there was a large anti-Equal Rights Amendment push along the lines of fear and misunderstanding of what such an amendment would mean to 'traditional' American values and as a result the amendments progress came to an abrupt stop (Columbia Law School, 2021).

It was not until 2017, 2018, and 2020 that the Equal Rights Amendment regained its momentum and received the final three ratifications it needed from Nevada, Illinois, and Virginia for it to achieve approval of the required ratification from 38 states (Columbia Law School, 2021). The problem, though, is that the time for the ratification process had long expired (Columbia Law School, 2021). Additionally, there had been some states who attempted to rescind their ratifications (Columbia Law School, 2021). These things leave the status of the Equal Rights Amendment uncertain.

Why the Equal Rights Amendment is Necessary

The amendment is necessary to make a difference for gender equality. Although many strides have been made in the last several decades for gender equality through different court cases and rulings there is still work to be done. The biggest portion of cases that ruled in favor of gender equality did so under the auspices of the 14th Amendment (Venetis, 2024). The 14th Amendment is no substitute for an equal rights amendment to the United States Constitution.

The 14th Amendment provides in relevant part that no State shall “...deny to any person within its jurisdiction the equal protection of the laws...” (U.S. Const. amend. XIV). This amendment was originally enacted in 1868 after the Civil War (Venetis, 2024). The intention of the amendment was to prevent racial discrimination since Black people were entitled to equal protection (Venetis, 2024).

The 14th Amendment is written quite broadly with no mention of gender or sex in it (U.S. Const. amend. XIV). There were several attempts prior to the 1970s to use the 14th Amendment to provide equal protections to women but they were unsuccessful (Venetis, 2024). It was not until Ruth Bader Ginsburg argued and won five of six Supreme Court cases in the 1970s which ushered in an era of unprecedented rights to women which arose out of Ginsburg’s legal brilliance and maneuvering of the 14th Amendment (Venetis, 2024).

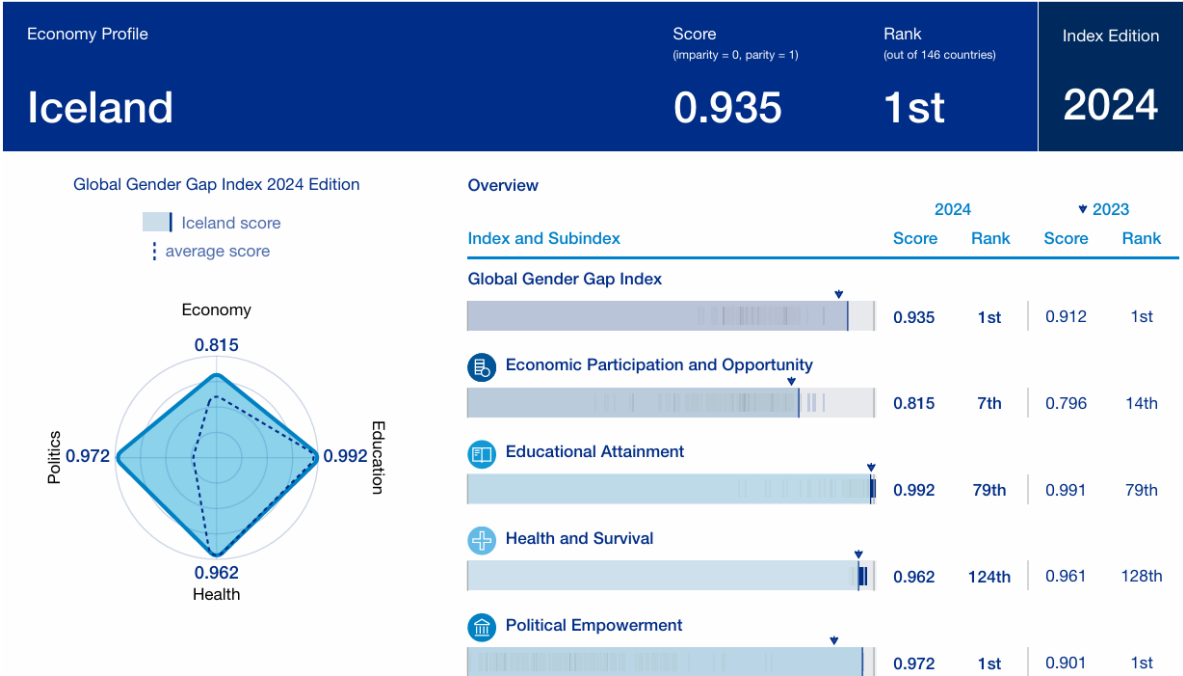
While Ginsburg’s efforts and advancements for women are phenomenal, they were at the hand of an amendment which was originally intended for racial disparities and only effectuated through constitutional interpretation. The issue with this is that it leaves those rights which were established by caselaw vulnerable to reassessment by another composition of the Supreme Court of the United States who may interpret the 14th Amendment in a different manner. Nothing more plainly frames this issue than the famous quote of the late Supreme Court Justice Antonin Scalia who famously said in 2011 “Certainly the Constitution does not require discrimination on the basis of sex. The only issue is whether it prohibits it. It doesn’t” (Jenkins, 2019, para. 4).

The Equal Rights Amendment is necessary as it will solidify the tenet of equality which is the cornerstone of America and American democracy (Columbia Law School, 2021). The Equal Rights Amendment will also fill in the deficiencies that exist in the current law schemes and require the utmost level of review for discrimination based on gender (Columbia Law School, 2021). It will also bring the United States on par with the 14 countries who have already enacted this safeguard of legal protection (Buchholz, 2023).

Taking the Equal Rights Amendment One-Step Further: Iceland, a Paradigm

Iceland is one of the 14 countries worldwide that has full legal protections for women and gender equality (Buchholz, 2023). Additionally, according the 2024 Global Gender Gap report Iceland ranks first out of 146 countries in achieving gender parity according to its global gender gap index with a score of 0.935 (1.0 being full gender parity) (World Economic Forum). Iceland, it appears, is leading the way to gender equality as its Constitution states clearly and in relevant part, “[e]veryone shall be equal before the law and enjoy human rights irrespective of sex, religion, opinion, national origin, race, colour, property, birth or other status. Men and women shall enjoy equal rights in all respects” (§VII, Article 65). Figure 4 shows the breakdown of how Iceland measures in terms of the different indices and subindices regarding the gender parity.

Figure 4
Iceland Gender Parity Profile



Source: World Economic Forum, 2024, p. 203.

Even with such clearly stated protections in its Constitution, Iceland takes its gender equality protections one step further. The government enacted the Act of Equal Status and Equal Rights Irrespective of Gender to clearly set forth and delineate the requirements and parameters of its equal protection guarantees for citizens (Government of Iceland, 2021). The purpose of this is to maintain gender equality (Prime Minister’s Office, n.d.).

The Equal Status Act is overseen by the Prime Minister’s Office (Prime Minister’s Office, n.d.). The Directorate of Equality is the establishment under the Prime Minister whose job is to “supervises the implementation of the Act, provides advice, public education and information concerning gender equality” (Prime Minister’s Office, n.d.). Additionally, every four years an action plan must be submitted and approved by Parliament which sets forth the plans and tasks to continue to foster gender equality in Iceland (Prime Minister’s Office, n.d.).

Action Project: Equality for All

It has been well established herein that there is a lack of women in leadership positions, which is due to gender inequality (DeVona & Weiner, 2024; UN Women, 2023). While equality is the goal, the pathway forward to allotting women the opportunity to reach leadership positions is through justice. Justice can be achieved through fixing what is broken in the system (Farrukh & Baqai, 2023, p. 223) and herein what is broken is a lack of explicit and legal protections of equality for women. The way to achieve these protections is through the implementation of stronger policies and legislation to ensure equality and that women have the same rights and privileges as men. The enactment of such policies and legislation is a two-part plan which includes:

- First, finalizing the Equal Rights Amendment: publication and certification of the Equal Rights Amendment to the United States Constitution.
- Second, expanding the protections of equal rights through:
- Reinstatement of along with Expanding the Scope and Operation of the Gender Policy Council;
- Establishing a Secretary of Equality; and
- Implementation of Federal Regulations with benchmarks for gender equality.

Step 1: Finalizing the Equal Rights Amendment

As has been laid out herein, the Equal Rights Amendment is in flux at this time. It has received the requisite number of state ratifications for addition as an amendment to the United States Constitution, yet it did so after the ratification deadline which was set by Congress (Columbia Law School, 2021). This conundrum leaves the amendment in an area of legal uncertainty. The last step for any constitutional amendment to become law is for the United States Archivist to publish and certify the amendment (Cohen & Codrington, 2019). Therefore, until the Archivist takes such actions, the Equal Rights Amendment shall remain in an unknown state.

Step 2: Expanding the Protections of Equal Rights

Even with the implementation of the Equal Rights Amendment there is still work to be done. The mere act of stating that men and women have equal rights is not enough. There needs to be policies and procedures in place to ensure that the provisions of the Equal Rights have the effect they are intended to have.

Reinstatement of and Expanding the Scope and Operation of the Gender Policy Council

In 2021 the Office of the President established the Gender Policy Council (“GPC”) (United States Government, 2024). The purpose of the GPC is to “to advance gender equity and equality in both domestic and foreign policy development and implementation” (United States Government, 2024). This council reports to the President and takes a whole government approach to the issue of gender equality by working with all governmental agencies to effectuate gender equality and policies (United States Government, 2024).

As a relatively new council, the GPC has made some significant strides and accomplishments in the realm of gender equality. According to the February 2023 Progress Report on the National Strategy on Gender Equity and Equality, the White

House identified several areas within which progress had been made which included, among others, “Supporting Access to Good Jobs and Advancing Workplace Protections.” Included as a subset in this strategic initiative was “Launching the Good Jobs Initiative” and “Protecting workers with caregiving responsibilities from discrimination” (The White House, 2023).

During President Trump’s second term he took action to dismantle the GPC (Executive Order No. 14148, 2025). This is a setback to moving forward with achieving more women in leadership positions. As such, reinstatement of the GPC is called for and necessary in the movement towards gender equality.

With reinstatement of the GPA there needs to be an eye towards where GPC took us and where women need to go. The efforts of the GPC moved in the right direction for the general equality of women, but they were not strong enough to make the broad and exacting changes needed to advance women. The reinstatement of the GPC needs to expand their strategic priorities and specifically work towards addressing the issue of the lack of women in leadership. As has been set forth herein, the issue of lack of women in leadership is an issue which needs attention from the highest level of government to make progress.

Establishing a Secretary of Equality

In addition to expanding the scope and operation of the GPC there is a need to add a Secretary of Equality to the President’s Cabinet. Currently the President’s Cabinet includes the Vice President, 15 executive heads, and seven additional cabinet level advisors (Greenspan, 2023). The reason for the addition of a new cabinet secretary is because the “Cabinet members...play a key political role, providing public support for White House policies and technical expertise in implementing them” (Greenspan, 2023). The United States is at a critical junction in its push toward gender equality and based on this the addition of a Secretary of Equality would be beneficial in moving the initiative forward.

Another aspect of the addition of a Secretary of Equality would be that it would serve as a central hub for gender equality and claims of discrimination. Currently there are Offices of Civil Rights spread across multiple federal agencies such as Department of Justice (Department of Justice, 2024), Department of Education (Department of Education, 2024), and Health and Human Services (Department of Health and Human Services, 2024). Each of these agencies is responsible for overseeing and establishing its own enforcement of civil rights issues which includes discrimination (Department of Education, 2024; Department of Health and Human Services, 2024; Department of Justice, 2024). The Secretary of Equality could be an integral part of streamlining and universalizing gender equality across agencies. This would be reflective of the reach of the GPC as it was set up as a council which services the whole of government (United States Government, 2024). Additionally, the Secretary of Equality would be responsible for following and reporting the progress towards achieving gender equality.

Implementation of Federal Regulations with benchmarks for gender equality

The last step in enhancing and expanding of the Equal Rights Amendment is the implementation of federal regulations with benchmarks for gender inequality. In 2020 the Pew Research Center conducted an online survey wherein they asked several questions about gender equality (Barroso). Included in the survey was a question as to whether people thought that the United States had gone far enough with its efforts of equal rights (Barroso, 2020). The majority of American adults said no, the US has not gone far enough in its efforts with equal rights (Barroso, 2020). Therefore, in addition to finalization of the Equal Rights Amendment there needs to be efforts to implement specific federal regulations regarding gender equality.

As set forth above, Iceland has made significant strides with gender equity, and they have a specific act which addresses gender equality (Government of Iceland, 2021). In looking at Iceland's legislation, one of the most impactful requirements is a required threshold of women on certain entities and boards at 40% (Government of Iceland, 2021). While this is an ambitious and, arguably, not a feasible requirement in the United States the fact that there is global legislation which requires specific thresholds to reach gender equality shows that there is a long way to go in the United States before we reach gender equality.

Conclusion

Increasing the Number of Women in Leadership Positions

This research began with the issue of the lack of women in leadership positions. The end of this research, with the implementation of the proposed action project, will result in the eventual achievement of gender equality. As gender parity is achieved women will not face as many hurdles as before in their journeys to become leaders. The result of this will be an increase in the number of women in leadership positions.

Explicit Legal Protections

The finalization of the Equal Rights Amendment will be an explicit protection for women. This, coupled with the proposed legislative and policy changes, will amount to specific and direct legal protection for women. This protection will provide a direct protection to women and not require the indirect judicial interpretation that has been relied upon by the Supreme Court's use of the 14th Amendment (Venetis, 2024). Finally, the enactment of a federal Equal Rights Amendment would end any discrimination which may still be lurking within the states as state law cannot supersede federal law (U.S. Const. art. VI, §2).

Good for 'Business'

Not only would the implementation of the Equal Rights Amendment increase the number of women in leadership positions in business, but it would also be economically beneficial. Studies show that because women do not participate fully in employment and in entrepreneurship there is a cost of approximately 15% to the world of its Gross Domestic Product (Sylvie, 2020). This gender inequality causes an actual cost to society and the world (Sylvie, 2020). It has been estimated that if women were to fully participate in the economy in a manner which is equal to how men participate then there would be an additional \$28 trillion amount added to the Gross Domestic Product by 2025 (Sylvie, 2020). By failing to achieve gender equality businesses are losing out on additional profits.

Improving Culture

The addition of an Equal Rights Amendment would influence culture. Culture, as has been seen in the last several years, has been shown to change quickly when the conversation shifts (Law, 2020). It is when this shift occurs that things that were previously allowed are now no longer okay (Law, 2020). If this were to evolve through the lens of gender equality there could be a trickle-down effect of fostering a culture which reflects gender equality throughout all aspects of culture and society. This would be separate and apart from legal requirements and transcend into moral tenets.

Strengthening the Theory of Equality

While the research herein originally started with the study of equality and how gender inequality was inhibiting women from attaining leadership positions the final theoretical implications are broader in scope. The result of the research and action project is to achieve gender equality through the finalizing of the Equal Rights Amendment and issuance of corresponding legislation and regulations to strengthen gender equality. These actions enhance not only number of women leaders, but they strengthen and further the theory of gender equality and equality of women.

Challenging the Assumption that Equal Rights Amendment is Unnecessary

The 14th Amendment has been used as the basis for several seminal rulings to infer gender equality to women. The use of this amendment has been touted as the baseline for such equality, but it was never the intent of the amendment. The action project herein would finalize the Equal Rights Amendment, and with this amendment, gender equality would be solidified and not just inferred through the language of the 14th Amendment.

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Global Leadership Without a Passport: Hospital Chaplains and the Micro- Construction of Organizational Culture

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Abstract

Background: Global leadership scholarship has treated the national border as a proxy for cultural complexity, which confines the field to leaders who travel. Research on organizational culture, for its part, tends to assume that culture is made by executives or by established occupational subcultures. Neither literature has a place for the practitioner who works across several cultural worlds within a single institution while holding no formal rank and belonging to no occupational community. **Objectives:** This article introduces the concept of non-positional cultural leadership to account for how such practitioners take part in the micro-construction of organizational culture. **Methods/Approach:** Board-certified hospital chaplains serve as an extreme case. The article draws on five theoretical traditions in sequence (cultural intelligence, boundary spanning, leadership-as-practice, relational leadership, and micro-constructionism) to explain how influence can arise from the margins of an organization. **Results:** The explanation rests on a mechanism the article calls witnessed repetition: relational encounters, repeated in view of colleagues over long periods, gradually change what a unit assumes a clinical encounter should contain. Four testable propositions follow, concerning how these practitioners work within institutional hierarchies and why standard measures of cultural intelligence may perform poorly when the stakes are existential rather than commercial. **Conclusions:** Moving the unit of analysis from the executive suite to the bedside shows cultural leadership to be widespread and largely unrecorded. The article closes by marking the limits of third-person theory and calling for phenomenological research into how practitioners themselves experience this work.

Keywords: global leadership; non-positional cultural leadership; cultural intelligence; hospital chaplaincy; organizational culture; boundary-spanning leadership

Paper type: Research article

Introduction

Hospitals are among the most culturally complex institutions in modern society. They bring together scientific precision, ethical uncertainty, and human vulnerability, often in the same room and within the same hour of the same day. While clinical guidelines and technical skills determine the care patients receive, the informal rules governing how doctors, nurses, and other caregivers treat each other and their patients are equally vital. Culture is more than a byproduct of hospital operations. It shapes whether frontline workers speak up when they see something go wrong (Edmondson, 1999, 2018), whether patients with different cultural and religious backgrounds experience competent and respectful care (Kleinman & Benson, 2006), and whether moral responsibility for clinical decisions is shared or borne individually (Epstein & Hamric, 2009).

Two mature scholarly fields should be well equipped to account for how these cultures arise and change. Global leadership theory has studied the actions of leaders within culturally complex environments for 40 years (House et al., 2004; Mendenhall et al., 2017; Reiche et al., 2017). Organizational culture scholarship has documented how cultures work, especially in healthcare settings (Cameron & Quinn, 2011; Mannion & Davies, 2018; Schein & Schein, 2017). Both fields, however, share the same blind spots. Global leadership theory has historically treated cultural complexity as a matter of geography, assuming that leadership becomes global only when a leader crosses a national border (Mendenhall & Bird, 2013; Mendenhall et al., 2012). Organizational culture theory presents a different challenge. Schein (1990) treats founders and senior executives as the primary architects of culture, and that perspective remains the field's most cited, despite its founder-centric bias. While an interpretive stream has located culture-making in the meanings members construct, it typically theorizes this work as a collective output, a product of subcultures, occupational communities, or coalitions (Bechky, 2003; Kellogg, 2009; Martin, 2002).

Neither literature accounts for a particular kind of practitioner. This practitioner holds no rank, belongs to no occupational community within the organization, and works through relationships that cross every such community without settling in any of them. Such work contributes to the culture in which care happens, yet the practitioner has no collective through which to make it. This article introduces non-positional cultural leadership as a theoretical construct to describe this practitioner. The practitioner in question shapes culture from a position the organization chart treats as insignificant, and board-certified hospital chaplains serve here as the primary test case.

Chaplains were chosen for this inquiry because their conditions are extreme. An extreme case is selected for what it reveals rather than for how well it represents a population, and it earns its place when the mechanism under study runs at unusual intensity there (Flyvbjerg, 2006; Seawright & Gerring, 2008). Chaplains hold no positional power, yet they work at the juncture where a hospital's unspoken norms come briefly open to renegotiation. If cultural leadership without rank exists anywhere, it should be visible here.

The article makes three arguments. First, it extends global leadership theory downward into domestic healthcare microsystems via the nested competency argument. Cultural complexity is present in these systems in concentrated, high-stakes forms, and the competencies identified in global leadership are thus pertinent to

domestic practitioners who will never cross a border. Second, it provides a micro-constructionist correction to organizational culture theory, shifting the site of cultural production from the executive suite to the mundane, relational interaction. Third, it sequences five established theories, not previously brought into relation with one another, into a model of non-positional leadership, identifying witnessed repetition as the primary mechanism through which influence crosses from the interpersonal to the unit level.

This article defines non-positional cultural leadership as an informal, relationally mediated practice of meaning-making, boundary-spanning, and ethical reflection. The construct describes how practitioners contribute to the micro-construction of culture through repeated, witnessed interaction rather than through any formal authority. While the construct is bounded to board-certified chaplains in U.S. hospitals to ensure testability, the implications extend to a wider class of non-positional boundary-spanners, such as interpreters, patient advocates, and ethics consultants, who operate in the margins of complex organizations. Attending to these practitioners rather than to the executive suite shows that the field has overlooked a group of cultural producers already at work in its institutions. Studying them brings global leadership research closer to its stated subject, which is leadership under conditions of cultural complexity wherever those conditions occur.

Global Leadership Recast

Whether global leadership theory applies to a hospital chaplain at all has to be established before anything can be built on it. The argument of this section is that the competency demands of the chaplain's terrain are the ones the field already measures. Cultural intelligence is treated as the individual threshold, and the analysis is placed at the level of the hospital microsystem rather than the enterprise.

The Nested Competency Argument

Reading U.S. hospital chaplains through global leadership scholarship needs explaining. The incongruity is real: the theory was developed for executives in multinational corporations, and chaplains are not executives. The justification is the competency demands of the terrain on which chaplains operate. U.S. hospitals serving diverse urban and suburban populations are sites of perpetual cross-cultural encounters among patients and families from plural national, religious, and ethnic backgrounds; among staff formed in distinct occupational subcultures; and among institutional value systems that are simultaneously biomedical, administrative, spiritual, and communal. The complexity global leadership theory was built to analyze is present here in concentrated form, even though the geographic scope is entirely local.

This extension follows the field's own trajectory. The earliest cross-cultural leadership literature arose from necessity, as U.S. multinational corporations expanding abroad in the 1970s and 1980s confronted the practical problem of selecting and training expatriate managers (Mendenhall et al., 2017). The literature treated culture as a feature of place, encountered through movement, and interpreted leadership as an individual's ability to get along in a foreign country. The layering of occupational, generational, ethnic, and institutional cultures present in any diverse workplace went unobserved.

The shift began in the 1990s and gained momentum with the GLOBE study (House et al., 2004). By examining leadership values across 62 societies, GLOBE demonstrated wide cross-cultural variation in endorsed leader behaviors alongside the near-universal valuation of certain attributes. What counts as good leadership, the study established, depends on cultural expectations, an insight that has since informed the field's most influential definitions. Reiche et al. (2017) define global leadership as “the processes and actions through which an individual influences a range of internal and external constituents from multiple national cultures and jurisdictions in a context characterized by significant levels of task and relationship complexity” (p. 556). They note that the definition goes beyond formal positions or job titles. Little in that definition requires a passport to enter. Its operative terms, a range of constituents, multiple national cultures, significant task and relationship complexity, describe the daily condition of a major urban hospital nearly as well as they describe a multinational corporation.

Calling domestic hospital chaplaincy “global leadership” only holds if one can say clearly what makes leadership global. The field has already answered this question, and the answer is not geography. Mendenhall et al. (2012) broke the construct into three dimensions. Complexity is contextual, produced by the interaction of multiplicity, interdependence, ambiguity, and flux. Flow is relational and refers to the richness and volume of information a role must move across boundaries. Presence is spatial-temporal and refers to how far a role requires someone to move physically across geographic and national boundaries, rather than communicate across them. Global, on this account, is a matter of degree along three axes. No role is simply global or not.

Scored this way, the hospital chaplain is a specific and instructive case. Complexity is high on all four drivers (Mendenhall et al., 2012). A single bedside can hold attending physicians, nursing staff, social workers, an ethics committee, an interpreter, and a family spanning three generations and two languages. Each party carries different stakes, and none can act alone (Currie et al., 2012). The same clinical facts support incompatible readings, and the disagreement is frequently about what the facts mean rather than what they are (Kleinman & Benson, 2006). The situation reorganizes itself hour by hour. A chaplain standing at one bedside may have to work across the positivist logic of Western biomedicine, the efficiency logic of hospital administration (Reay & Hinings, 2009), and a family's sacred, cosmological, or ancestral account of what is happening to them. Such accounts may be Abrahamic, Dharmic, indigenous, or secular humanist. Adjusting one's communication style does not meet this demand. The work is closer to translation between worlds that do not share a description of reality. Flow runs high as well, since boundary spanning is constitutive of chaplaincy, a claim developed at length below.

Presence is the exception. On that dimension the chaplain scores nothing, because the chaplain never leaves the building. The extension proposed here stops at that limit, and the limit should be stated plainly. The article does not claim that chaplaincy is global leadership in every dimension the construct names. The claim is that chaplaincy sits high on the two dimensions that carry the competency demands and low on the one the field has used as its admission criterion. Mendenhall and Bird (2013) argue that development should be targeted by where a role actually falls on complexity and boundary spanning, rather than by an assumption about who counts as global in the first place. Applied consistently, that reasoning extends to the chaplain. The same

reasoning excludes many workplaces. Where differences are demographic rather than ontological, stakeholders are few, conditions are stable, and practitioners span no boundaries, a workplace scores low on complexity and flow and falls outside this account, whatever its diversity profile.

A second shift ran alongside it: from traits to competencies that can be learned. Earlier trait models looked at stable qualities such as openness to experience and tolerance for ambiguity (Caligiuri & Tarique, 2012). This implied that a person either had the makings of a global leader or did not. Ng et al. (2009) reframed the question. They described cultural intelligence as a meta-level capability that a person builds by drawing developmental value from unfamiliar cultural encounters. If this is correct, the relevant question about practitioners is one of training: what has their formation actually equipped them to do?

Global mindset scholars locate the capacity for global leadership in managerial cognition, cosmopolitanism, and cognitive complexity; mobility does not figure in it. Levy et al. (2007) show that the construct has been theorized largely without reference to where a manager is standing. If what makes a leader global is a way of holding difference in mind, then nothing in the construct is doing the work the border has been asked to do.

Cultural Intelligence: The Individual Threshold

Of these paradigms, cultural intelligence (CQ) has the strongest empirical record, and its limits are also the easiest to specify.

Earley and Ang (2003) proposed the construct, and Ang et al. (2007) provided the form most researchers now use. Borrowing the multiple-loci model of intelligence (Sternberg & Detterman, 1986), Ang et al. argued that functioning well across cultures draws on four separate capacities rather than a single general capacity. Metacognitive CQ is the ability to catch one's own cultural assumptions in motion and revise one's reading of a situation. Cognitive CQ is knowledge of value systems, religious traditions, and how cultures organize themselves. Motivational CQ is the willingness to stay in an interaction once it becomes effortful instead of pulling back from it. Behavioral CQ is what a person does with voice, face, and body in a particular encounter. The four predict different outcomes. Metacognitive and cognitive CQ predict cultural judgment and decision-making; motivational and behavioral CQ predict cultural adaptation; and metacognitive and behavioral CQ predict task performance (Ang et al., 2007). The fact that different dimensions predict different outcomes supports the claim that the four measure distinct capacities.

That CQ adds predictive power beyond general and emotional intelligence is one of the better-replicated findings in the literature. Rockstuhl et al. (2011) studied 126 Swiss military officers who led both at home and across borders. Emotional intelligence was the stronger predictor of domestic effectiveness; cultural intelligence was the stronger predictor of cross-border effectiveness. Groves and Feyerherm (2011) found that leader CQ predicted leader and team performance on culturally diverse teams beyond what leader emotional intelligence and other competencies explained. General intelligence and warmth, in other words, do not by themselves make cultural difference legible. The implication for the caring professions is considerable. A practitioner who is emotionally attuned but culturally uninformed can misread the cultural content of an

emotionally charged moment and end up interpreting the patient's suffering through a personal frame rather than the patient's.

None of these findings transfers to healthcare without qualification. CQ was developed and validated almost entirely in corporate and military settings, where a cross-cultural encounter is a performance problem and the costs of failure are economic or operational. Hospital work occurs under other conditions: suffering, dying, grief, and moral crisis. What is at stake is how a patient understands their last weeks, or whether a bereaved family can grieve in a way that makes sense to them. Whether the model's dynamics hold when the stakes are existential is a question the literature has not addressed.

Critics have also charged the model with a universalist and quietly essentialist ontology, one that treats cultures as bounded and knowable enough to be measured on standardized scales, and reviews of the field have questioned current measurement approaches and proposed alternatives (Leung et al., 2014). The assumption is strained in clinical settings. People's relationships with their own religious and cultural identities are frequently unsettled, ambivalent, or mid-change. Immigration, illness, disagreement between generations, and the disorienting experience of a biomedical institution carrying its own cultural assumptions all press on those identities.

Identities under that kind of pressure are also identities under someone's authority, and about authority CQ research has had very little to say. The model describes what an individual practitioner can do inside a cross-cultural encounter. It says nothing about how hierarchy, structural inequality, and the routine dismissal of non-biomedical knowledge shape what is available to be done in the first place. No published finding contradicts CQ on this point. The gap is one of omission: the reviews describe what the construct measures, and power does not appear. Some practitioners sit low in the medical hierarchy and belong to minority religious, cultural, or racial groups inside institutions that are predominantly secular and White. For those practitioners the omission matters a great deal.

These criticisms do not disqualify CQ. They mark its boundaries. The construct maps the architecture of cross-cultural competency and has little to say about existential stakes, cultural fluidity, or power.

The article relies on CQ's empirical record while predicting, below, that the CQ instrument will underperform in the setting studied here. The two positions are compatible because they concern different things. The record establishes that cross-cultural capability is differentiated rather than unitary, and that its dimensions predict different outcomes; that is a claim about the structure of the construct. The later prediction concerns the calibration of a scale developed for managers and military officers when it is carried into rooms where someone is dying. What this argument borrows from CQ is the four-factor architecture of capability, not the effect sizes. Carried into this setting, the instrument should keep its four-factor structure and lose much of its predictive power.

Proposition 1. The CQ instrument will lose predictive power in this setting while retaining its four-factor architecture, and the loss will be uneven. Rockstuhl et al. (2011) supply the benchmark: the strength with which CQ predicted cross-border effectiveness among officers who led both at home and abroad. Metacognitive and

cognitive CQ should hold near that benchmark. Motivational and behavioral CQ should fall well below it, because existential stakes change what those two capabilities consist of. The unevenness matters because of a competing explanation. Board certification already selects on the capacities CQ measures, and any population selected in that way will show weaker correlations simply because the range of scores is restricted. Range restriction, however, predicts that every factor attenuates by roughly the same amount, whereas the argument here predicts a specific pattern. Uniform attenuation would count against the argument and the predicted pattern would count for it. A weak result of either kind would bear on the transportability of the instrument rather than on the construct itself.

Nesting Global Leadership in the Hospital Microsystem

An obvious objection remains. These theories were built for executives with formal cross-border mandates, and nothing in a chaplain's job description resembles one. The nested competency argument answers it by shifting attention from the mandate to the terrain, and recent work questions the executive-and-border framing from another angle.

Chua et al. (2023) argue that cultural diversity inside the workforce has grown complex enough to require new organizational approaches from leadership, and they treat that complexity as a general condition of organizational life rather than a feature of a company's international operations. Cross-cultural skill, on that reading, is as relevant to people working in multicultural environments at home as to those who travel (Caligiuri & Tarique, 2012). In healthcare, workforce diversity is itself a leadership problem: learning to connect with patients who do not share a language or a theory of illness, and building a team people want to belong to (Figueroa et al., 2019; Pelasoja et al., 2026). Chen et al.'s (2020) synthesis of the multicultural aged-care workforce found cultural skill already present among staff and team cohesion widely wanted, alongside something less comfortable: experiences of racism largely kept quiet, rarely reported upward, and met with inaction from management when they were.

The parallels are real, but two differences need to be acknowledged, because passing over them would make the argument look easier than it is. One is stakes. The gap between a bad quarter and preventable deaths, unnecessary suffering, or families left feeling disrespected is vast. The other is articulability. Much of what cross-border executives need to know is available in codified form: legal codes, published cultural briefings, documented business practices. Much of what the hospital practitioner needs to know is not codified at all: the different ways a family approaches end-of-life care, their understanding of pain, the way institutionally held beliefs about the boundary between faith and biomedicine operate in practice. Much of that knowledge lives in practices its holders have never fully articulated. The cultural terrain on which hospital practitioners work is therefore less charted and less directly accessible than the terrain executives face.

The nested competency argument comes down to a single claim. Skills that global leaders use successfully in cross-cultural interactions are reflected in the day-to-day activities of practitioners operating in multicultural microsystems, closely enough that the two can be read in tandem, from either direction. Global leadership scholarship helps explain key elements of their practice, and their practice shows the limits of global leadership scholarship's language.

The Chaplain as Organizational Actor

Reading the chaplain as a leader presupposes a description of the role. The following sections describe how chaplains are formed and credentialed and then ask what the evidence shows about whether their work reaches beyond the bedside into the organization.

Formation and Certification

Healthcare chaplaincy is conceptually rich and empirically under-researched compared to other clinical professions (Fitchett, 2017; Pesut et al., 2016). Its history of professionalization also differs in ways that bear on the cultural leadership argument. Parish pastors first provided hospital chaplaincy services. Much of the early American hospital infrastructure was founded by religious communities, and they sent clergy to provide sacramental ministry to fellow believers (Cadge, 2012). These clergy received ecclesiastical rather than medical education and were marginal to the emerging healthcare team. The distance between that arrangement and current board-certified chaplaincy helps explain why chaplains' cultural contributions are possible today when their predecessors' were not.

Anton Boisen led the change. Boisen was a minister who spent time in an involuntary psychiatric commitment and came to believe there were lessons to be learned from those who suffered and broke down. In 1925 he founded a training program at Worcester State Hospital focused on learning from what he called living human documents rather than relying on doctrinal texts alone. His program led to what eventually became clinical pastoral education (CPE) (Boisen, 1936; Cadge, 2012). Today a board certification candidate must complete a graduate-level theological degree, four units of clinical pastoral education, a period of supervised professional experience, and a certification review based on published competencies, and must hold current endorsement from a recognized spiritual or faith community (Association of Professional Chaplains, 2017; Cadge, 2012). The endorsement requirement bears on the argument that follows: the chaplain is credentialed by a community outside the hospital and is a delegate of none within it.

What CPE does to the person who completes it has begun to be measured. A pilot study of seven chaplains in NHS England found that CPE participation sharpened self-awareness, made practice more deliberate, and raised measured emotional intelligence (Szilagyi et al., 2024). The sample is small and the setting is not American, so the finding should be generalized with caution. It does suggest that formation changes the practitioner in ways that patient-level outcome measures were not designed to detect.

Details in the profession's competency standards bear directly on this argument. The *Common Qualifications and Competencies for Professional Chaplains* organizes competencies into four domains: integration of theory and practice, professional identity and conduct, professional practice skills, and organizational leadership (Association of Professional Chaplains, 2017). The final domain is not a marginal addition, and two of its five competencies name the institution directly. OL1 requires the candidate to "promote the integration of spiritual care into the life and service of the institution in which one functions" (Association of Professional Chaplains, 2017, Section IV, OL1). OL3 requires the candidate to "understand and function within the

institutional culture and systems, including utilizing business principles and practices appropriate to one's role in the organization" (Association of Professional Chaplains, 2017, Section IV, OL3).

Read closely, these competencies establish more than the chaplain's status as an organizational actor. They require the candidate to understand institutional culture and to operate within it, but they go no further. The standard does not ask what happens to that culture when a practitioner formed in this way works within it for a decade. Culture appears in the credentials as terrain to be worked in, not as something the profession's members help to produce. The present article takes up that omission from the side of theory.

The formation may also be less even than the standard implies. Cadge et al. (2019) report that theological educators, clinical educators, professional chaplains, and the organizations that employ them are not working from a common understanding of what makes a healthcare chaplain effective. The formal standards, then, appear more ambitious in their organizational dimensions than the formation processes preparing practitioners to meet them. Whatever chaplains are credentialed to contribute may be unevenly distributed across the profession, and that heterogeneity shapes how the argument should be tested.

From Clinical to Organizational

Since the mid-2000s the literature on chaplains' clinical contributions has grown substantially, as the evidence-based medicine movement pressed all clinical services to demonstrate measurable outcomes (Fitchett, 2011; Handzo & Koenig, 2004). Validated instruments such as the FICA Spiritual History Tool (Puchalski & Romer, 2000) and the HOPE questions (Anandarajah & Hight, 2001) have moved spiritual assessment from a courtesy extended to religious patients to a standard dimension of clinical evaluation. Patients whose spiritual needs are attended to report higher satisfaction and less anxiety, and they engage more with advance care planning that matches their beliefs (Pearce et al., 2012; Steinhäuser et al., 2000, 2017; Williams et al., 2011). All of these outcomes are patient-reported. That is the strength of this literature and also the limit of what it can show.

In palliative and end-of-life care, attention to dying patients' spiritual needs is associated with greater peace, less psychological distress, and less non-beneficial aggressive treatment at the end of life (Balboni et al., 2007, 2010; Phelps et al., 2009). National guidelines now list spiritual, religious, and existential care as one of the eight core domains of quality palliative care (National Consensus Project for Quality Palliative Care, 2018). The conversation has shifted from whether chaplains belong on the team to how their work is best used.

Within interprofessional teams, chaplains work across patient experience, clinical decision-making, and institutional practice in a way no single clinical discipline does (Cadge, 2012). Without biomedical expertise, chaplains contribute to ethics consultations by attending to the value-laden aspects that principle-based ethics do not fully address (Cadge, 2012; Fox et al., 2007). Each consultation builds the chaplain's institutional standing through relationships rather than position, consistent with boundary-spanning theory (Ernst & Chrobot-Mason, 2011).

Boundary-spanning theory also anticipates resistance to the full inclusion of chaplains. The literature reports exactly that. Department directors' understanding of what chaplains do varies widely (Flannelly et al., 2005), and spiritual care is still treated as optional rather than expected. The structural evidence is blunter. Between 1980 and 2003 the share of U.S. hospitals with chaplaincy services held between 54% and 64% with no upward trend, and over the last decade of that span church-operated hospitals were more likely to drop the service than to add it (Cadge et al., 2008). These findings show how organizational culture conditions the extent to which chaplains can affect it, a reciprocal relationship taken up again under Proposition 2.

Almost no evidence exists for chaplains' effects on organizations beyond their clinical work, a gap U.S. chaplains have named as a priority for the field's research agenda (Damen et al., 2018). Szilagyi et al. (2022) convened an international expert panel of chaplaincy leaders and researchers during the COVID-19 pandemic. The panel described six themes of chaplaincy leadership: professional confidence, trust-building with executives, decision-making, innovation and creativity, trusting connections with colleagues, and the promotion of cultural competence. All six name organizational effects rather than patient-level ones. A panel of this kind, however, documents expert perceptions of effect rather than the effect itself. The distinction matters here because little other evidence supports the organizational side of the argument.

Professional confidence meant being comfortable asking questions about spirituality and meaning when they would not otherwise arise, usually in formal decision-making meetings. Trust-building refers to the social capital that accrues from a dependable presence. Snowden's (2021) survey of 1,657 chaplains in 36 countries found that chaplains supported staff, took up unfamiliar technology, and improvised where guidelines were lacking.

Judged by the vocabulary of positional leadership, these activities did not count as leadership, and Snowden (2021) concluded that chaplains in general lack leadership skills. An alternative reading is that the practice was present and the vocabulary for recognizing it was not. Supplying that vocabulary is part of what this article attempts.

The Dutch evidence cuts the other way. Den Toom et al. (2023) compared chaplaincy surveys taken 20 years apart and found professionalization concentrated in what chaplains know and what they believe rather than in where they stand. Their expertise had broadened and their worldviews had pluralized to include non-religious and non-affiliated positions, but their organizational embedding had not changed, and structural participation in multidisciplinary consultation had fallen. If organizational standing followed from professionalization, the Netherlands should show it, and it does not. The Dutch setting lacks the board-certification structure that anchors the U.S. profession, which may be part of the explanation. The finding still stands as a caution against assuming that a more professional chaplaincy is a better-positioned one.

Jeuland et al. (2017) described how palliative care chaplains routinely support healthcare personnel in addition to patients. More recently, interviews with a German neuropalliative home-care team described the chaplain as shaping team culture and what the authors call workplace spirituality (Bublitz et al., 2025). The country and setting differ from the U.S. hospital, and the team was small enough that a single person could plausibly account for the whole effect. If a chaplain sits with a nursing team after a spate of patient deaths, or stands with them through institutional turmoil,

the effect may extend beyond those directly involved: their actions may shape team norms about emotion, self-care, and what it means to care for people in this institution. That inference goes beyond what the studies show. Jeuland et al. and Bublitz et al. document chaplains supporting staff, but neither traces an effect beyond the people in the room. The step from supporting a team to shaping its norms is the step this article asks the reader to consider, and the research agenda below is designed to test it.

Working cross-culturally raises a harder question. Bang et al. (2024) interviewed 14 chaplains and found high comfort working across cultural difference, which the chaplains attributed to training in cultural sensitivity and humility. The same study named gaps in that training as a separate theme. Confidence and preparation are different things, and a profession can have a good deal of the first while lacking the second. The gap is a reason for caution before describing chaplains as cultural brokers, and it points to the Western, Abrahamic center of gravity that still shapes chaplaincy training.

Taken together, the formation, clinical evidence, and organizational data describe board-certified chaplains as participants in institutional culture rather than bystanders. None of this literature explains how that participation works. An explanation requires two further accounts: how influence travels in the absence of rank, and how that influence comes to register as culture. The next two sections take these up in turn.

Leadership Without Position

Cultural intelligence, as argued above, is the individual threshold. Three further traditions carry influence from the individual outward. Boundary spanning explains structural access, leadership-as-practice makes the work recognizable as leadership, and relational leadership supplies its ethical register. Where that influence registers, and through what mechanism, is the subject of the section after this one. The traditions are not separate pillars. Each depends on the one before it, and together they form a sequence of requirements.

Boundary Spanning: Structural Mechanisms of Access

Cultural intelligence describes what a practitioner brings into the room but not how that influence travels beyond it. Boundary spanning addresses that question. The concept receives little attention in the general leadership literature, yet global leadership research identifies it as one of the most frequently cited components of effectiveness (Mendenhall & Bird, 2013). For that reason the concept is introduced here from global leadership research, where it is central, rather than from a neighboring field in which it is peripheral.

Building on Aldrich and Herker's (1977) account of boundary roles, Ernst and Chrobot-Mason (2011) developed a more active concept of boundary work. Boundary spanners do more than transmit information between groups; they shape what moves across boundaries and which alliances become possible. They identified six practices: buffering, reflecting, connecting, mobilizing, weaving, and transforming. The concept fits healthcare well because the institutional setting is marked by proliferating specialties and by repeated encounters among clinical, administrative, and patient communities (Currie et al., 2012; Reay & Hinings, 2009). Healthcare has tested the idea at close range, and the results are mixed. Gibeau et al. (2020) followed 20 co-

leadership dyads and found that bridging competing logics, where it happened at all, often came about through one side absorbing the other rather than through balanced integration. Recent fieldwork also identifies trust-building as a mechanism for involving groups not represented in formal structures (Bianchi et al., 2025).

Chaplains are close to a textbook example of a boundary-spanning position. They are not clinicians, administrators, or family members, yet they have legitimate access to all three groups, and they enter at moments when institutional assumptions become visible and open to negotiation. Ernst and Chrobot-Mason's practices align broadly with the chaplain's role: buffering, by protecting a patient's spiritual needs from operational pressures; reflecting, by naming implicit assumptions within the team; connecting, by maintaining long-standing relationships with clinical staff. Research has shown that chaplains help orient newcomers to the institution, support cultural bridge-building, and contribute to ethically charged decisions no single member of a professional subgroup can make alone (Cadge, 2012).

Antoine et al. (2021) interviewed healthcare executives about how they decide to fund spiritual care. The executives named the chaplain's work with staff, in tragic situations and through organizational change, before they named patient satisfaction, and that work figured in their resource decisions. Chaplains therefore register at the level where budgets are set, through a channel that lies outside the patient encounter altogether.

What studies have shown but not yet theorized is how costly boundary spanning can be for an individual. Those who span boundaries risk injuring their identity when they move between groups that do not fully accept them as members (Kane & Levina, 2017). Needham et al. (2017) separate boundary spanning that is written into a job from boundary spanning that merely emerges in one, and argue the emotional labor lands differently in the two cases. The chaplain's boundary spanning is of the second kind, and no job description accounts for it. For a chaplain who spans boundaries throughout every working day, the costs accompany the benefits. The concept may also romanticize spanning across groups, as if this were possible outside existing structures of power. In organizations, boundary spanners must work across vertical hierarchies as well as horizontal ones (Yip et al., 2016), and those hierarchies tend to discount or suppress voices from outside dominant professional subgroups (Langley et al., 2019).

Leadership-as-Practice: Relocating the Unit of Analysis

A practitioner may span every boundary in the building without doing anything that conventional theory would recognize as leadership. Leadership-as-practice (LAP) addresses that problem. Where conventional research locates leadership in the decisions and traits of those with formal authority, LAP argues that leadership is a feature of particular interactions. It is distributed among members, emerges from everyday activity, and is not held by any single person (Crevani et al., 2010; Denis et al., 2012; Raelin, 2016). LAP shifts the unit of analysis from the leader to the practice.

Healthcare has provided fertile ground for LAP. Clinical work requires expertise distributed across teams, constant coordination, and a high cognitive and emotional load (Denis et al., 2012; Spanos et al., 2024). The benefits of collective leadership include improved teamwork, greater psychological safety, and better patient safety (De Brún et al., 2020). Research on distributed leadership is increasingly common in the

field (Sfantou et al., 2017; Spanos et al., 2024). Many articles report the experiences of practitioners who lead without holding formal positions (Leclerc et al., 2021; MacPhail et al., 2015). What this means is unsettled, and LAP raises the question directly. Conventional leadership research cannot ask what effect chaplains have on culture through their day-to-day interactions, because such actions would not qualify as leadership. If leadership emerges from practice rather than position, and culture emerges from collective practice, then in LAP any member's daily practice is potentially a form of cultural leadership. A chaplain leading a family meeting where team and family hold different expectations, or sitting with a nurse working through a difficult moral decision, is engaging in leadership in this sense. During the pandemic Snowden's (2021) survey found chaplains improvising in precisely these ways. Snowden interpreted the improvisation in positional terms and concluded that chaplains were deficient in leadership skills. Klitzman et al. (2023) add that institutions shape how much room there is for creative improvisation in the first place.

Strong versions of LAP hold that collective practice constitutes leadership, rendering individuals analytically invisible. That position is too restrictive for cases where practitioners' formation, long tenure, and relational skills make a difference. As a secular theory, LAP also has no language for the vocational and theological concerns practitioners value. Positioned at the organizational level, LAP addresses the first objection. Relational leadership theory addresses the second.

Relational Leadership: The Ethical Register

Relational leadership treats leadership as something made in the relation between people rather than held by one of them (Uhl-Bien, 2006; Uhl-Bien & Ospina, 2012). Relational skills remain underdeveloped in primary care teams despite their importance (Cleary et al., 2018; Maritsa et al., 2022) and the evidence linking them to reduced burnout and greater work satisfaction (Cummings et al., 2018; Wei et al., 2020).

Its alignment with chaplaincy education is what makes this theory especially relevant. Non-anxious presence, a term that reaches chaplaincy from Friedman's (1985) work on family systems, is developed through CPE and through contemplative practice across traditions. It is the capacity to stay in the room, and stay quiet, when the situation is unbearable. Cultural humility, as taught in chaplaincy training, parallels the medical field (Tervalon & Murray-García, 1998) in emphasizing lifelong self-examination, attention to power between caregiver and care receiver, and learning from those receiving care. Whether chaplains actually practice relationally remains an open empirical question. Two observations are possible: chaplains are trained for the roles this theory describes, and documented examples show chaplains supporting teams facing ethical challenges (Jeuland et al., 2017; Kwak et al., 2022).

The theory is also largely prescriptive. It describes what relational leadership looks like when it works, but it has less to say about why practitioners who endorse it may still be unable to act relationally under time pressure, power dynamics, and organizational norms. A second limitation matters most in multicultural contexts. The account of selfhood underneath this theory belongs to a particular culture. Cunliffe and Eriksen (2011) build relational leadership on a dialogic reading of the self, and the stream draws its ethics more broadly from Levinas (1961/1969), for whom the encounter with the Other grounds moral obligation. Alterity in that sense assumes a bounded,

individuated self meeting another distinct moral subject. It cannot be assumed to transfer smoothly to practitioners and patients socialized elsewhere. Interdependent conceptions of the self, such as those in Confucian relational ethics, Ubuntu, and many Indigenous traditions, treat the self as constituted through relationships and therefore derive moral obligation from a different source. Behaviors these theorists describe as authentic, such as direct verbal acknowledgment, may not match what other traditions take to express integrity, where discretion, deference, and mutual silence carry the same weight. The theory does not exclude such actions. It has simply not theorized them yet. For practitioners whose daily work involves exactly this kind of cross-cultural engagement, the limitation is also an opening, since practice can inform theory and the theory can be refined.

From Interaction to Culture: Schein and Micro-Construction

The three traditions above explain how a chaplain's influence travels outward but not where it takes effect. That account is developed here in two steps. The first examines Schein's architecture of culture and its bias toward founders and executives. The second turns to the micro-construction literature, which shows how culture is also made and remade in ordinary interaction.

Schein's Architecture and Its Founder-Centric Bias

Organizational culture is among the most consequential and least well-specified variables in healthcare systems research (Braithwaite et al., 2017; Mannion & Davies, 2018). It affects how staff talk to each other, whether they report or hide mistakes, how they treat patients from non-dominant cultures, and how they implement institutional policy (Betancourt et al., 2003; Institute of Medicine, 2000; Mannion & Davies, 2018; Reason, 2000). Making claims about non-positional practitioners' capacity to shape culture requires a clear account of what culture is and how it changes.

Edgar Schein gave the best-known account, arguing that culture operates at three levels: artifacts, espoused values, and basic underlying assumptions. The deepest of these remains hidden and shapes how organizations function without being stated (Schein, 1990). The model locates the practitioner's role at each level. Artifacts are the visible and felt dimensions of care: handoffs, rounds, and the rituals that mark milestones, including memorial services and ethics consultations. Chaplains are actively involved in several of these, and their absence from others indicates where spiritual care sits in the institution's structure.

Patient-centered care, clinical excellence, cultural responsiveness, and staff wellbeing sit at the espoused level. Among the most reliable sources of cultural tension in healthcare is the gap between what an organization says it values and what it rewards (Braithwaite et al., 2017). Chaplains work inside that gap: in ethics committees where stated values collide with operational realities, and in the support they provide to staff after adverse events. The basic underlying assumptions are rarely stated and almost never contested. They govern daily clinical decisions and patients' experiences of the institution: what counts as legitimate knowledge, which professional categories merit deference, and what defines a good death.

One weakness in the model bears directly on this argument. It says a great deal about what culture is and very little about how culture is created and negotiated through daily action. For Schein it is mainly founders and senior executives who create culture, with most employees receiving culture rather than producing it (Schein, 1990). The fifth edition devotes more space to negotiation (Schein & Schein, 2017). A clear distinction still remains between actors who produce culture and those who consume it, with the practitioner without rank left on the consumption side. Chaplains are not founders or senior leaders, yet their relational work seems to touch the deepest levels of culture in ways the founder-based model does not anticipate.

Denison's model of culture as involvement, consistency, adaptability, and mission (Denison & Mishra, 1995) has the same limitation from the other side. It measures culture from the outside, through aggregated survey scores, and does not address how cultural dynamics arise and are negotiated by professionals inside the organization. Mission is precisely the dimension where practitioners shaped by questions of purpose and value would be expected to be most strongly engaged.

Smircich (1983) drew the distinction that exposes this limitation, and Martin (2002) built a three-perspective framework around the claim that the integration perspective mistakes an executive's account of culture for culture itself. The differentiation perspective replaces the executive with the subculture, and the chaplain has no subculture in the hospital. The chaplain belongs to neither the nursing culture alongside which the work happens, nor medicine, nor administration, and the interfaith character of chaplaincy formation rules out acting as a delegate of a religious community either. Interfaith spiritual care is by now its own literature, and what a review of it shows is a practice defined by working across traditions rather than from inside one (Liefbroer et al., 2017). Any correction that accounts for this practitioner must therefore be located below the level of the group.

Micro-Construction: Culture Made in Interaction

Berger and Luckmann (1966) characterized the social construction of reality as a three-part dialectic. In externalization, humans produce cultural artifacts and ways of relating to them. In objectivation, these products begin to seem detached from the people who created them, as simply the way things are. In internalization, newcomers absorb these features as their own unquestioned assumptions. The dialectic assigns no role to leadership in driving it forward. All it requires is regular interaction among members, accumulating over time.

The process unfolds over time, and Weick (1995) explains how. After events occur, people make sense of them and form plausible accounts by acting on those accounts. Culture develops from such accounts over time.

Giddens (1984) gives the fullest account. Rules, resources, and taken-for-granted ways of acting are social structures that practitioners use in practice. Through action they reproduce or alter the structures available for subsequent action. Over a long tenure, such variations accumulate into structural change.

Barley (1986) showed what this looks like inside a hospital. Two radiology departments installed the same CT scanner in the same year and within months had settled into different working orders, with a different balance of authority between radiologists and

technologists in each. Barley attributed the difference to what the people around the machine did during the uncertain early weeks, such as who asked whom for help, who admitted to not knowing, and who stayed in the room, rather than to the technology itself, which was identical in both departments. The structures that formed around it were not. The analogy has limits, but a chaplain's arrival on a unit is likewise an occasion for structuring in Barley's sense, and what the unit becomes depends on what its members do with the chaplain over years of encounters.

Applied to the chaplaincy case, the three perspectives align. Nearly everything a chaplain does involves relational interaction at organizationally significant moments: after a death, during an ethically charged decision, in a conflict between the care team and the family. Chaplains are positioned within all three moments of Berger and Luckmann's dialectic, at the points where Weickian retrospective sensemaking is most active. Structuration explains what their presence does.

The literature has not asked which rules chaplains work with. They use interpretive schemes concerning relevance, that is, what counts as a consideration a clinical team is expected to weigh. They also work within norms about who may raise which subject in rounds or family meetings. Their resources are limited. They control no budget and can order nothing. What they have is access, granted by invitation, and the standing their certification and conduct in the room have earned.

They work with little, but one thing they can influence is the interpretive scheme itself. When a chaplain names the patient's fear of dying alone and the attending then takes that concern into account, the scheme for distinguishing clinical from non-clinical significance has been varied. When the same remark is received as kindness and set aside, the existing scheme has been reproduced and reinforced, because it survived the test. To alter the meaning conveyed by the decision, a chaplain need not persuade the attending to change the decision. Chaplains can influence culture simply by doing their job. Whether that influence is desirable is a separate question, and this article does not take it up.

Proposition 2. Chaplains' organizational influence lies at Schein's deepest level. A unit with a long-standing chaplaincy presence will differ from comparable units in basic assumptions about meaning, mortality, and legitimate knowledge, while remaining largely the same in espoused values and artifacts, meaning the things it would list if asked what it stands for.

The proposition faces a selection problem that should be acknowledged at the outset. The units that keep chaplains are oncology, intensive care, palliative care, and the neonatal unit. Their assumptions about mortality and meaning were already different before any chaplain arrived, which is part of why a chaplain was invited, so the causal arrow can run the other way as easily as the way proposed here. This is the reciprocal relationship noted earlier: culture conditions access, and access, if the argument is right, then conditions culture. A cross-sectional comparison of units cannot separate the two. Two designs can. The first follows a single unit across a change in chaplaincy presence, a program started, expanded, or lost to a budget cut, and asks whether basic assumptions move after the change rather than before it. The second compares matched units inside one service line, two oncology floors in the same hospital, one with a chaplain embedded in rounds and one without. Without one of these designs,

any support for the proposition would be correlational and open to the reverse explanation.

Proposition 3. Influence rests in interaction and accumulates with length of stay. A chaplain's tenure in a single unit will predict cultural influence better than seniority, credentials, or committee affiliation.

The Core Mechanism

Up to this point the argument has identified a candidate leader, a route by which that influence travels, and a level at which culture gets made. What it has not done is say how these connect. The mechanism that does the connecting is the subject of this section, along with the question of how its effects could be detected and, at the end, why culture is worth influencing in the first place.

Witnessed Repetition

The central mechanism proposed in this article is witnessed repetition. It is offered as an answer to a question that theorists of organizational culture have asked for a long time without settling: how does something that happens in one hospital room, between two or three people, become a norm for an entire unit, or for a system?

The answer starts from a term in institutional theory and then leaves it behind. Isomorphism describes how organizations come to resemble one another by imitating practices that appear to work (DiMaggio & Powell, 1983). The process described here operates on a much smaller scale and is different in kind. It takes place within a single unit and among individuals rather than organizations, and what builds up over time is a changed expectation about what belongs in a clinical encounter, not a copy of anything the chaplain did. In the terms Kozlowski and Klein (2000) use, this is compilation rather than composition, because the unit-level property emerges from encounters that differ from one another and from the whole. Witnessed repetition is the name given here to the process through which that compilation takes place.

The closest rival account is Zucker's (1977). In a series of experiments, Zucker showed that an act handed on as simply the way things are done here persists across generations of members with no one enforcing it, and that it persists more faithfully the more institutionalized the setting is. Witnessed repetition accepts Zucker's premise that culture travels through interaction rather than decree. The parting point is the question of who changes. Zucker's mechanism acts on newcomers, who accept an act as objective fact because it reaches them with no identifiable author attached. The mechanism proposed here acts on people who are already there. A nurse who has spent eleven years on the unit is not learning a new fact when watching the chaplain work. What shifts is the nurse's expectation of what a clinical encounter ought to contain, and it shifts slowly, mostly unnoticed, because the same kind of thing has happened often enough that it no longer registers as unusual. Zucker's account explains why a culture holds steady. The account offered here is concerned with how a culture changes even though its membership does not.

Consider a chaplain who pauses during a clinical handover and lets its pace slow to match the tempo of a family's existential concerns. The clinical staff who are present see this happen. When it happens month after month, and then year after year, it

gradually ceases to read as a chaplaincy intervention and comes to read as something the unit simply expects. This is how the mechanism connects the individual level to the organizational one. The claim is not merely that the chaplain is helpful. The chaplain's practice changes what the unit assumes a clinical encounter should include. Staff do not copy what the chaplain does. At first they make room for it. Later they come to defer to it, and in time some of them begin asking for it. Over a period of years the unit's basic assumptions about death, grief, and patient autonomy change, and they change without anyone having written a policy, because the repeated encounters have made this response the one that requires the least effort.

To name the mechanism is one thing; to specify it is another. Multilevel theorizing requires an account of how phenomena at one level connect with those at another, and so far the argument has asserted a relationship between levels without saying exactly how it runs. Two matters have to be settled before the mechanism can be considered specified. The first is what has to be true for a practitioner's cultural intelligence to be realized in relational practice at all. The second is what kind of level-crossing takes place in between.

The answer to the first is visibility. So long as a chaplain's cultural intelligence stays inside a dyad behind a drawn curtain, it does nothing whatever to the culture of the unit. It begins to matter when a third party watches it work. Berger and Luckmann would call this objectivation: a practice becomes the way things are done here only after it is visible to people who had no part in its origin. What allows cultural intelligence to register at the level of the unit, then, is an audience. Additional skill on the chaplain's part adds nothing if no one is there to see it.

Visibility bears on the second matter as well. Kozlowski and Klein (2000) distinguish two routes by which a lower-level property can become a higher-level one. Under composition, the unit's property is assumed to be the sum or the average of what its members hold; the content is the same at both levels and can be recovered by survey. Compilation makes no such assumption. It permits the higher-level property to arise from contributions that differ from one another and from the whole, and this is the compilation introduced above. Basic assumptions do not behave in the way composition requires. Schein's whole point about them is that they are taken for granted, and a nurse cannot report an assumption held without knowing it. The unit-level property must arise instead from a configuration of encounters that are not alike, accumulated over years and spread across staff, most of whom did not witness one another's encounters. Repetition is what aggregates them, and it does so unevenly. Nothing changes at the level of the unit until enough people have seen enough instances that a new expectation has become the default and no longer draws comment.

It follows that influence should track how visible a chaplain's encounters are rather than how many there are. Two chaplains of equal skill will leave quite different marks on a unit if one works mostly at the bedside and the other mostly in rounds and family meetings. Because a compiled property is a configuration and not a total, the same unit-level assumption can arise from quite different histories, and studies that treat chaplaincy exposure as a single dosage variable should find weaker effects than they predict (Morgeson & Hofmann, 1999). Both points refine Proposition 3. Tenure predicts influence, but only through the visibility of what accumulates over that tenure.

Why Culture Is Worth Influencing: The Outcome Evidence

Culture is among the strongest predictors of the outcomes that hospitals exist to achieve. Among the safety-related constructs, psychological safety has one of the most developed evidence bases. Edmondson (1999) defined it as a team's shared sense that it is safe to take interpersonal risks. Newman et al. (2017) distinguish it from trust: trust is what one person makes of another, whereas psychological safety is what a group takes to be its norm. Their review also finds that its antecedents are spread out. Leader behavior matters, but peer relationships and the unit's own habits matter as well, and it is this that makes the construct relevant to someone who supervises no one.

Units that foster open conversation and treat improvement as routine work report better quality metrics (Braithwaite et al., 2017). Relational nursing leadership increases patient satisfaction and reduces adverse events (Wong et al., 2013). A unit's relational norms correlate about as strongly with burnout, moral distress, and turnover as workload does (Laschinger & Leiter, 2006; Shanafelt & Noseworthy, 2017; West et al., 2018). Shanafelt et al. (2021) conclude that whether work remains meaningful in the face of suffering depends on institutional context and not on individual strength alone. The practices this literature identifies as protective, which involve finding meaning, reflecting ethically, and accompanying others through suffering, are practices that chaplains spend years developing and are trained to bring to others.

Culture grants voice to some while denying it to others. Hierarchical culture determines who speaks up and silences non-physician voices, even when the information they hold bears on outcomes (Mannion & Davies, 2018). Moral climate shapes retention and moral capacity (Fumis et al., 2017; Pauly et al., 2009). Chaplains fit uneasily within these hierarchies. Their role lets them see across the silos that keep an organization from seeing itself whole, and it leaves them belonging to none of those silos, a trade consistent with Williams's (2002) account of boundary-spanning competence as relational work done from outside the hierarchy. When chaplains persist in raising perspectives that hierarchical norms suppress, the effect goes beyond advocacy. Repeated year after year, the practice gradually weakens the assumption that the hierarchy is inevitable. This literature also suggests that leaders' emphasis on vision, hope, and altruistic love affects practitioners' experience of meaning, which in turn influences burnout and commitment (Ashmos & Duchon, 2000; Duchon & Plowman, 2005; Fry, 2003; Fry & Cohen, 2009; Gotsis & Grimani, 2017; Hunsaker, 2019; Steger et al., 2012).

Spiritual leadership theory is not integrated into this article. The omission reflects a principle rather than a judgment about the value of the tradition. It is also why Schein (1990) is included even though his structure is founder-centric, and why Cunliffe and Eriksen (2011) are included even though their cases are managers. A tradition is included when its mechanism continues to function in the absence of formal position and set aside when the mechanism depends on that position. Cultural intelligence, boundary spanning, practice, and responsiveness to others all continue to work when no one has rank, so their mechanisms are integrated. Spiritual leadership claims a causal relationship grounded in the leader's formal role, and that relationship disappears once the role is removed. The same standard applies to what this article can claim. Both Fry's and Shanafelt's effects are tested in people who stand in a supervisory relationship to those affected. That relationship may account for the effect.

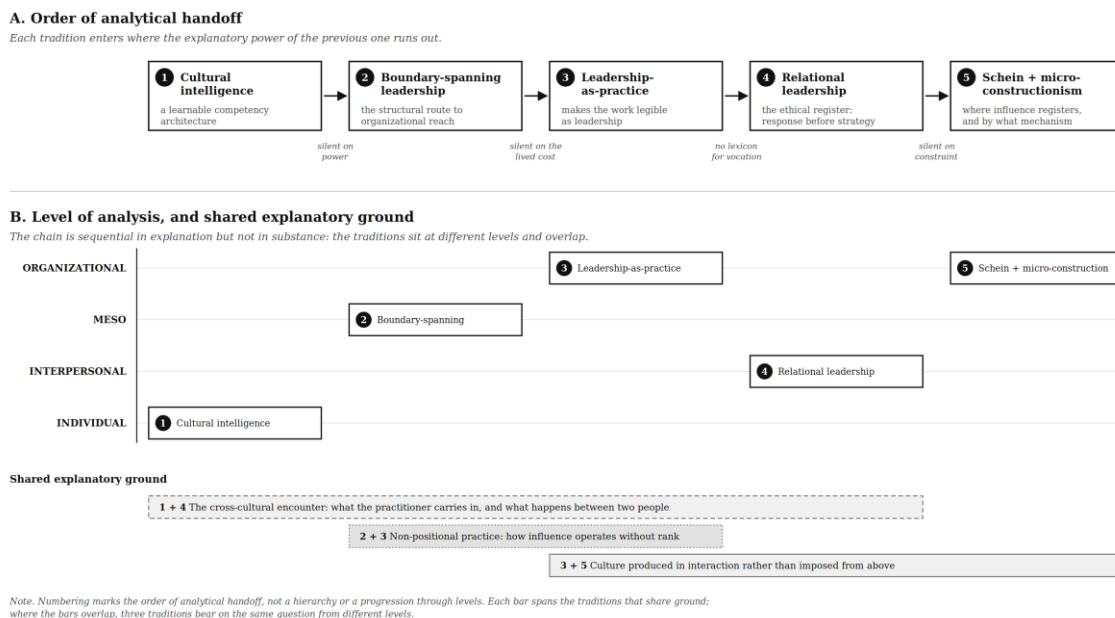
This article asks whether making meaning yields the same outcomes when the person doing it lacks authority.

Holding the Tensions

Some of the tensions among these traditions are better left open than resolved prematurely. Individual agency and structure pull against each other. In LAP's strong version, the individual disappears. Relational leadership focuses on the interaction between individuals but can neglect the organizational constraints that determine which interactions are possible at all. Keeping the theories at different levels of analysis, as Figure 1 shows, is what allows them to complement rather than duplicate one another.

Figure 1

The Five-Tradition Chain: Order of Analytical Handoff and Levels of Analysis



Source: Author's illustration (2026)

Idealized accounts of relational and boundary-spanning practice also sit awkwardly beside the settings where the practice happens. Gibeau et al. (2020) state the problem most sharply: collective leadership may be most needed exactly where it is hardest to achieve, and when it looks smoothest it may not be doing its work at all. Koonce and Hyrkäs (2023) interviewed nurses about moral distress and concluded that chaplains should be used strategically to help with it. Whether anyone helps the chaplain is a separate question, and the available evidence is not encouraging. Fantus et al. (2025) argue that institutions marginalize practitioners trained for ethical advocacy, producing cumulative distress and moral injury that are difficult to measure from outside (see also Guthrie, 2014).

A further strain runs through all five traditions, and it is methodological. Each works from the outside in, reconstructing the actor's meaning from what an observer can see rather than asking the actor. When a chaplain attends to one cue and lets another pass, or chooses not to speak for a reason colleagues cannot guess, an outside-in

theory must decide whether this is noise or evidence that the frame does not fit. Without access to the actor's account, that decision is inevitably speculative. Interpretations from outside the practice, however confident, can dismiss as random variation what was, from the inside, the most important thing the practitioner did.

What the chain describes is a distinct form of leadership: a continual relational practice of ethically responsive, culturally intelligent, boundary-spanning influence at the deepest levels of culture, achieved through accumulation rather than command. Servant and spiritual leadership both begin with a formal leader developing followers. This one does not, because its unit of analysis is practice rather than office. Generic models of informal influence assert that such influence exists; the chain specifies what it consists of.

What the Construct Is Not

Six established constructs describe adjacent territories closely enough to need separating. Meyerson and Scully (1995) named the tempered radical as the committed insider who works across conflicting value systems without positional power and sustains ambivalence rather than resolving it. Star and Strauss (1999), drawing on Strauss's studies of hospital work, traced the ecology of invisible work, the relational labor that keeps an organization running without appearing in anyone's account of it. Dutton and Ashford (1993) specified issue selling as the mechanism by which someone without authority places a concern on a senior agenda. Kellogg (2009) showed that low-power actors can produce durable institutional change in surgical services. Feldman and Pentland (2003) split the organizational routine into an ostensive aspect, the routine in principle, and a performative one, the routine as carried out on a given day, and located change in the gap between them. Bandura (1977) explained how people acquire behavior by watching others perform it.

Each of these touches something non-positional cultural leadership also touches, but none accounts for what it names. The tempered radical acts against a dominant culture on behalf of a personally held commitment; the chaplain more often has no position to advance and works instead to keep competing accounts open. Invisible work describes labor that goes unrecognized, while the claim here concerns labor that registers in a unit's assumptions whether or not anyone recognizes it, which is why witnessed repetition rather than recognition is the mechanism. Issue selling moves a discrete issue upward through a hierarchy and ends when the issue is taken up, whereas witnessed repetition works laterally, accumulates over time, and is addressed to no one in particular. Kellogg's reformers act as a mobilized cohort with shared identity and common grievances. The chaplain has none of these. The routines literature comes closest. What a unit expects a clinical encounter to contain is the ostensive aspect of a routine in Feldman and Pentland's sense, and change through repeated performance is their mechanism as much as this one. The difference is in who performs. Their performers are the routine's own participants, varying a script they are all party to. The chaplain is not a party to the clinical script. The chaplain performs alongside it, and the routine changes without any of its owners having varied it. Bandura's observers, for their part, reproduce what they have seen, whereas staff do not replicate the chaplain's act but change what they expect to happen around it. What remains, and what this construct names, is culture-making by a practitioner who works alone in structural terms, without rank, without a cohort, and without an audience that can be required to attend.

Bringing these five traditions together crosses an epistemological threshold. Cultural intelligence originated in the positivist tradition. It hands a practitioner a questionnaire and reports a score on the assumption that cross-cultural ability is a measurable individual capability (Ang & Van Dyne, 2008). LAP and relational leadership reject that, holding that leadership is co-constructed and present only while it is being done (Carroll et al., 2008; Uhl-Bien, 2006). The tension can be put to use. Cultural intelligence is what a chaplain brings into the room before knowing what to do with it, and the other two describe what becomes of it once the chaplain is in the room with someone looking back. On this reading cultural intelligence is renegotiated in each situation rather than carried as a fixed score.

Critical Frames

The mechanism proposed here has a blind spot, and identifying it alters the argument.

Standing is not distributed evenly. Crenshaw (1989) showed that disadvantage compounds where categories intersect, so that a person can be poorly served by any account treating race and gender one at a time. Yancy (2017) describes what it is to be looked at rather than seen, and what a body carries into a room before it has said anything. Ahmed (2006) makes the point in spatial terms. Institutions are oriented; some bodies arrive already aligned with what a space expects while others arrive at an angle to it, and the difference is experienced as ease or friction rather than recorded as policy. None of these authors writes about chaplains, but all three describe the conditions under which being witnessed confers standing on one person and nothing on another.

For chaplains the issue is concrete. White et al. (2021) found gendered patterns in U.S. chaplaincy board certification, where the patriarchal structures of both religious and healthcare institutions surface inside the profession's own credentialing system. Chaplains are largely formed in predominantly Christian institutions (Cadge, 2012). The chaplain is not a culturally neutral figure and does not work from a blank slate. A framework that celebrates the chaplain as a boundary-spanning cultural leader without asking who sets the terms of that leadership, and whose cultural perspective the institution actually values, misdescribes the terrain it claims to map. The chaplain's own perspective is part of that question, and it may be minoritized by race, religion, or gender.

The critical frames therefore do more than counsel caution. They identify a condition within the mechanism itself. If cultural influence accumulates through witnessed repetition, it accumulates only where what is witnessed is granted standing, and standing is distributed by the same hierarchies this literature describes. Power is thus internal to the argument, and it enters as a moderator.

Proposition 4. Institutional recognition moderates the mechanism. The influence predicted in Propositions 2 and 3 will be weaker where the chaplain's own cultural, racial, religious, or gender position is minoritized relative to a unit's dominant norms, because witnessed repetition accumulates only where what is witnessed is granted standing. Two chaplains of equal tenure and comparable practice will leave different marks on otherwise similar units, and the difference should be predictable in advance from whose cultural perspective the institution already treats as credible.

Skeptical Voices

These cautionary voices strengthen the argument by imposing discipline on it. A theory shows its value through the predictions it supports. This one predicts its own mechanism operating differently in different settings, with different histories of formation, and to varying degrees depending on whether a given unit's culture is open to change. Cadge's (2012) detailed descriptions of how chaplaincy looks in various settings are exactly what a structuration-based account would expect: the structures practitioners draw on vary from institution to institution, and so what their practice reinforces or changes varies as well. Skeptics are most useful in identifying what evidence is missing. What is missing is not more outcome studies; the phenomenon has to be described before its effects can be measured.

One counter-reading would reverse the argument outright. A critical account could hold that chaplains do not erode the hierarchy but preserve it. By absorbing moral distress that would otherwise accumulate into open conflict, the practice may relieve the very pressure that produces structural change and leave the arrangements generating that distress intact. On this reading the chaplain is a safety valve, and the deeper the chaplain's cultural influence, the more efficiently the institution is stabilized. Currie et al. (2012) describe this kind of institutional work, in which an activity that looks like accommodation turns out to maintain professional power. Nothing in the argument as stated excludes this reading.

The two readings make different predictions, and the difference is observable. If witnessed repetition works as claimed, units with long chaplaincy presence should over time show more open disagreement across professional lines, not less, because what accumulates is the standing of perspectives that hierarchical norms would otherwise suppress. The co-optation reading predicts the opposite: distress is absorbed, the surface quiets, and upward challenge decreases. Durable chaplaincy presence alongside falling rates of cross-professional challenge would falsify the account advanced here and support the co-optation reading. Cultural construction from below is seldom a quiet process. By introducing alternative value systems into the clinical decision-making space, the practitioner complicates the life of the hierarchy rather than easing it, and an institution that grows more comfortable with ambiguity, dissent, and existential friction over time is showing evidence of genuine cultural construction.

The Residual Gap and a Research Agenda

It remains to take stock. This section states what the argument contributes to global leadership theory and to the study of organizational culture, identifies the gap that remains once the five traditions have said what they can, and proposes two research programs to address it.

Theoretical Contribution

Global leadership theory comes out of this argument with a wider scope. The literature has used the national border as a proxy for cultural complexity, with the result that leadership becomes global only when someone crosses a frontier. If the proxy is replaced by the condition it stood in for, the field's competency apparatus becomes applicable wherever cultural complexity is dense, including an intensive care unit

staffed by people who will never work abroad. The border began as a convenient sampling criterion and hardened into a definition.

Organizational culture theory needs a correction of a different kind. Schein's architecture is persuasive about the layers of culture and less so about who produces them. Reading those layers through Berger and Luckmann, Weick, and Giddens moves cultural agency from position to interaction. This shift is what allows a practitioner with no rank to be understood as a producer of culture as well as a recipient of it.

The third contribution is the construct itself. Non-positional cultural leadership names a practice that neither literature has been able to see. It specifies the mechanism through which the practice operates, witnessed repetition, and in doing so makes audience rather than skill the condition of any unit-level effect. It also yields four propositions that can be tested and falsified if the mechanism is wrong.

What the five traditions cannot do is another matter. Even assembled and corrected, they share a limitation: each does genuine analytical work, and none reaches first-person experience. Each has its particular limit, such as the secular gap in leadership-as-practice or the inattention to power in cultural intelligence, and together those limits mark a single boundary between third-person theory and the lived experience of the practitioner.

This absence is neither a defect in the argument nor a finding in its own right. It marks a boundary. No one has yet written what it is like, in Nagel's (1974) sense, to be a practitioner with cultural influence at the margins of a multicultural healthcare organization. The silence follows from the nature of the traditions themselves, which between them exhaust what third-person theory can say. Beyond that point, phenomenological description has to take over.

A Research Agenda

This diagnosis calls for two research programs running in parallel, of which first-person description is the more urgent.

Descriptive phenomenology in the Husserlian sense is the appropriate method here. It asks the researcher to bracket all personal preconceptions and to treat experience itself as the primary text (Moustakas, 1994), and that discipline is needed for a phenomenon whose most important expressions, such as the cue attended to and the silence held, cannot be seen by outcome-based assessment at all.

In such descriptions the five traditions should serve as sensitizing concepts in Blumer's (1954) sense. They are ways of noticing what might turn out to matter in a practitioner's account, and they should not be turned into coding categories into which those accounts are sorted. The critical frames work in the same way. They direct attention to how practitioners handle cultural difference and to the uneven recognition an institution gives to different cultural perspectives, the practitioner's own among them.

Some of what such descriptions would need to capture can be specified now, before any interview is conducted, and doing so keeps the method honest, since the targets are named before the inquiry begins rather than after. Four of them stand out. The first

is the moment when a practitioner decides not to speak, together with what that practitioner weighs in reaching the decision. The second is the cue attended to when the room presents several at once. A third is the cost of holding a position that no one else in the room shares. The last, and perhaps the hardest to get at, is how the practitioner knows, if at all, that anything done carried beyond the doorway. All four are drawn from the literature and not from observation, and they should be understood as targets for the method rather than as evidence that the phenomenon exists.

At least one such description now exists. Tyohemba (2026) conducted a descriptive phenomenological study with twelve board-certified chaplains working in U.S. hospitals, asking how they had experienced influencing organizational culture in multicultural settings. Leadership and culture theories served as sensitizing concepts, much as proposed above. The chaplains who took part described an authority that came from encounter rather than from position, and a trust that had built up over years until the unit came to treat it as a resource it could draw on. One study settles very little, and that study was not designed to test the propositions set out here. What it does establish is that the phenomenon can be described in practitioners' own words, and it supplies a first set of accounts against which the four targets above can be checked.

Measurement Framework

The propositions call for a second program of work, and here the difficulty is practical. The instruments needed to test them have not been built. A tally of chaplain visits, which is what most departments already keep, will not capture anything described in this article, since what produces the effect is an encounter that somebody else saw, and a visit log records only that a service was delivered. What follows are three measures that might serve as a beginning. Their status should be stated plainly. None has been validated. Each is a candidate indicator that a research team would need to refine, pilot, and probably revise before it could bear any weight. Still, each connects to a specific proposition. The Silence-Fill Threshold and the Inquiry Pivot look for behavioral evidence of the change in basic assumptions that Proposition 2 predicts, and if the argument is right, both should grow stronger as a chaplain's visible tenure lengthens (Proposition 3) and grow weaker on units where the chaplain's standing has been minoritized (Proposition 4). Existential Lexicon Density asks a different question: whether the change has spread to staff who were never in the room when the originating encounters took place. Compilation predicts that it should.

The Silence-Fill Threshold

Anyone who has sat in a family meeting knows what happens when a patient asks whether dying will hurt, or whether a life amounted to anything. There is a pause, and someone fills it. On a unit where a chaplain is new, the person who fills it is usually a clinician, and the filling is nearly reflexive: a reassurance, a change of subject, a return to the care plan. On a unit where a chaplain has been present and visible for years, the pattern reverses. Clinicians let the pause stand. They have learned that the silence is doing something, and they wait for the chaplain to indicate when the conversation can move on. The point at which this reversal occurs is what the measure would try to locate.

The Inquiry Pivot

The second indicator concerns who initiates. Early on, if an existential perspective enters a clinical conversation at all, it enters because the chaplain put it there. Later, and this is the pivot, the attending or the charge nurse turns to the chaplain and asks. The question may be as brief as "Anything from your side?" but it signals that the clinical lead now expects the perspective to be present and has taken responsibility for calling for it. When insertion has given way to solicitation, a new assumption about what the encounter should contain has, in all likelihood, taken hold.

Existential Lexicon Density

The third indicator is the least direct and, for that reason, perhaps the most telling. It tracks how often words such as hope, legacy, narrative, and dignity appear in the ordinary speech of staff during routine rounds, in conversations where no chaplain is present. Nurses and residents who were never in the room for any of the originating encounters may nonetheless begin to use this vocabulary, and when they do, something has traveled. A visit count would show nothing here. A rising frequency of these terms among people who did not witness the encounters would be the closest thing to a direct observation of compilation that the argument allows.

Conclusion

The oversight this article has tried to correct is an old one, and it is easy to see why it has persisted. Organizational studies has looked for cultural leadership where organizations say it resides, in the offices of those with authority to set direction, and a practitioner who holds no such office, belongs to no clinical profession, and moves among competing cultural worlds within a single building was never going to appear in that field of view. The argument here has taken five bodies of theory in turn, cultural intelligence, boundary spanning, leadership-as-practice, relational leadership, and micro-constructionism, and used them to build a model in which cultural influence emerges from relational practice that is kept up over long periods and carried out where colleagues can see it. Hospital chaplains were the case, but they need not be the only one. Any organization that distributes its work across professional boundaries has someone in the non-positional boundary-spanning role, and that person's importance is poorly represented by the organization chart. Studying such roles means studying leadership in complex systems as it is actually distributed rather than as it is formally assigned. A theory of leadership that confines itself to formal positions will go on overlooking the people who negotiate an institution's underlying assumptions every day. Critical scholarship, for its part, would find more of interest if it looked past official agendas to the patterns of practice that take shape in the spaces between roles.

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Called to Serve: Exploring Servant, Authentic, and Relational Leadership Through the Narrative Journey of Pastor Rose

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Abstract

Background: Women leaders in faith-based organizations continue to navigate structural, cultural, and organizational barriers that still today challenge traditional expectations of religious leadership. **Objectives:** This study explores the leadership journey of Pastor Rose Sparks through the lens of servant, authentic, and relational leadership theories, highlighting her leadership identity, calling, resilience, and relational experience within both organizational and global leadership frameworks through a faith-based context. **Methods/Approach:** Using a qualitative narrative research design, this study explores interview-based data from Pastor Rose Sparks to gain practical insights into how lived experience, faith, organizational culture, and gender-related expectations contributed to the development of her core ideology and faith-based leadership identity. **Results:** This study narrative study identifies reoccurring themes of calling, resilience, values-based decision-making, relational engagement, and resistance to gendered leadership expectations beyond the traditional religious framework outlined by religious denominations. These themes highlight connections between Pastor Rose's lived experience and servant, authentic and relational leadership theories. **Conclusions:** This narrative-based research study further contributes to global and organizational leadership cultures by demonstrating how faith-based leadership can reflect servant and values-driven principles that are transferable across diverse organization and cultural contexts, while highlighting gender-related barriers that continue to exist in today's leadership practices.

Keywords: Servant Leadership, Global Leadership, Faith-Based Leadership, Women in Leadership, Narrative Analysis, Core-Ideology

Paper type: Research article

Introduction

Across traditions and continents rooted in faith, women who sense a call to religious leadership encounter a profoundly consistent set of barriers: patriarchal institutional structures, theological interpretations that hinder authority and promote cultural expectations that leadership belongs to men. From faith-based congregations deep within American roots to Catholic parishes in the hillsides of Europe, Anglican dioceses in sub-Saharan Africa, and Buddhist communities across Southeast Asia, women navigating spiritual leadership roles face challenges that are both deeply local, and yet globally shared.

In today's world, leadership is often defined as the ability to demonstrate authority and power in a manner that inspires influence and organizational outcomes. However, for many women, especially those who have chosen to root their identity into their faith, leadership is not just grounded in a positional power or a hierarchy of command but is a calling that is tied to humility and service.

This narrative study explores the story of Pastor Rose Sparks, a female pastor whose journey into spiritual leadership defies the traditional boundaries of Christian cultures while also embodying timeless truths to an internal walk of faith. Her leadership style is best understood through the lens of Robert Greenleaf's Servant Leadership Theory, which defines a servant leader as one who prioritizes the growth and well-being of others over personal ambition, highlighting the importance of selflessly giving of yourself to meet the needs of others for the good of those around you (Greenleaf, 1977). Larry Spears (1998) later expanded upon Greenleaf's theory to include that Servant Leadership embodies ten characteristic traits, including listening, empathy, healing, awareness, persuasion, conceptualization, foresight, stewardship, commitment to the growth of people, and building community. Both Greenleaf and Spears noted servant leadership as an outward act of behavior that reveals a person's inner reflections. This perspective helps to demonstrate how servant leadership emerges from a spiritual conviction that is defined by Greenleaf (1977) and Spears (1998) as a servant-first orientation, and what Pastor Rose identifies as her calling, interpreted through a faith-based lens. This framework helps define Christian women like Pastor Rose Sparks, whose leadership emerges not from ambition, but a calling she describes as a sacred desire rooted in meeting the needs of others, far beyond her own understanding.

Pastor Rose's leadership does not only rest on the foundation of service. Her journey also reflects the principles of Authentic Leadership Theory, which highlights self-awareness, internalized moral perspective, and relational transparency (Walumbwa et al., 2008). From an early age, Pastor Rose recognized a spiritual "tugging" that caused her to question her set expectations of her teachings and caused her to lean into an internal basis of trust. Her story is deeply rooted in inner conviction and outward consistency, both trademarks of an authentic leader. Furthermore, as her journey continued to unfold, her internal desire to build relevant and genuine relationships within her calling reflects Relational Leadership Theory, which highlights inclusive, purposeful, and ethical leadership through relationship building (Uhl-Bien, 2006).

Within faith-based contexts, often Christian women do not see servant leadership as a model or a framework that they are required to follow; instead, it reflects servant leadership that emerges through a deeply internalized desire to care for others,

prioritizing the well-being of those being served and building relationship grounded in trust (Obi et al., 2021). This reflects what individuals within faith traditions define as a divinely inspired purpose, and what servant leadership theory defines as a natural impulse to serve before seeking recognition or authority. Their leadership, often unrecognized by themselves, flows from an inner conviction rather than a desire for authority. Like many servant leaders, they do not see themselves as leaders at all, but as simply individuals who are fulfilling their divine purpose, rooted in a belief that their lives are being led by a specific purpose and calling, as acknowledged within their faith tradition. Pastor Rose Sparks did not plan to become a pastor. In fact, when she reflects upon the moments leading up to this journey, she describes a recognition that God was calling her to something more, identifying that feeling as a continual “tugging, an undeniable pull, that interrupted my plans and realigned my purpose.” Born and raised in Sullivan, Indiana, Pastor Rose grew up in the church surrounded by strong men and women of God, yet never really imagined herself behind the pulpit. In reality, this was unheard of; women did not hold leadership roles in the church. Yet today she holds the position of the lead pastor of Arlington United Methodist Church, in Bloomington, Indiana, an extension campus of a prominent local congregation, where she serves as both a leader of her church members and a trailblazer of change for women of the faith leading into the future.

Pastor Rose’s story is a powerful reflection of resilience, determination, faith, and purpose. Her journey is more than a personal triumph; it offers an exploration of identity, the endurance of theological conviction, and servant leadership as an outward action. Framed by Bamberg’s (2011) theory of identity construction, particularly the dilemmas of sameness versus difference, agency versus passivity, and constancy versus change, this interview-based narrative invites readers to walk along Pastor Rose’s journey of how her identity was shaped through seasons of confusion, heartache, rejection, resistance, and revelation, thus ultimately refined by the awakening and final submission to her divine calling.

According to Adventist Research (2025), only 8.4% of all pastors surveyed identified as female, highlighting the rarity of journeys like Pastor Rose’s. This underrepresentation is not isolated to a single denomination or geography; similar patterns exist across religious traditions worldwide, thus highlighting a broader global pattern. Across Catholic, Orthodox, evangelical Protestant, Islamic, and Buddhist traditions globally, women’s access to formal religious leadership roles continues to be shaped by theological interpretation, institutional hierarchy, and cultural norms (Lomotey, 2025).

Early Life and Foundation of Faith

Pastor Rose’s journey into her faith began as a young child. Her now religious leadership is deeply rooted in her early exposure to faith as an expectation as to who she was to become. These same expectations framed her identity around gender-related duties within the church. When asked about her formative years, she reflected with instant clarity and heartfelt conviction:

“I was raised in a legalistic, male-dominated home and church. While these two things created difficulties to overcome later in life, the freedom of worship in a Pentecostal church was a blessing.”

This paradox of identifiable strict religious structures on one hand and liberating worship on the other, allowed for both spiritual grounding and yet proposed an ongoing ideological conflict that could not be denied. Inside the home her mother was defined by cultural roles that followed the norm of those times that parallel the definition of servant-behavior that were expected of women, such as caring, nurturing, supportive, yet those traits were not identified as traits of leadership. She grew up recognizing that her mother had a spiritual influence within her life that modelled resilience that was constrained to the imminent role that she too was expected and defined to be in as she grew older. While the home represented a quiet expression of faith, the church offered a more formative, yet conflicted, spiritual pull for her. On one hand the freedom of worship within their Pentecostal tradition gave her a deep sense of connection and belonging to who she was, an open and safe space where she felt the Holy Spirit move and stir something within her even as a young girl. But on the other hand, the same church upheld firm distinctions about what male and female authority should look like beyond worship. This created an emotional conflict, as Pastor Rose began to feel not only to model her mother's servant heart in the home, but to also answer a deeper calling that extended her servant leadership desires beyond the boundaries traditionally set for women. The freedom to worship ignited a closer calling to her purpose, but the structural framework limited her to only dream of what her future might look like. The internal wrestling between obedience of her family, the calling of her God, tradition, and transformation, would become the hallmark of her servant leadership path.

When asked about the roles of adults in her family's church, Pastor Rose responded:

Men preached and were the leaders that sat on the board of the church. They made the decisions, they led the congregation, and they served as the voice of the body of the overall church. Women were allowed to sing, play instruments, instruct the kids, and other women, and cook for different events.

These roles were not just behavioral norms but structural mandates that reinforced deeply rooted beliefs about who was allowed to lead and who was expected to support. The pulpit was not a shared space; it was a gendered boundary line that was heavily guarded and rarely exposed to a woman's opinion.

This lived reality echoes the findings of Lee et al. (2025) whose research on Protestant congregations revealed that "church leadership has long been a male-dominated occupation, and women were traditionally prohibited from congregational leadership" (p. 1). Although women's representation in ministry has increased since the 1970s, women still remain significantly underrepresented in pastoral leadership. Furthermore, their research identified that clergywomen often encounter both a "glass ceiling" that restricts them to access influential pulpit positions, and a "glass cliff" that promotes women's failure in leadership is significantly greater than that of a man (Lee et al., 2025).

This scholarly evidence affirms Pastor Rose's observation that her early foundations of faith were rooted in not just a simple platform of proclamation but a structural symbol of exclusion, one that continues to separate gendered authority across multiple Christian denominations.

Calling and Decision to Pursue Ministry

As the interview questions shifted into reflecting upon when she first felt called to ministry, Pastor Rose remembers that stirring to be a part of something that ignited dating back to her childhood. One explicit memory she had as a little girl was that of a visiting missionary sharing their experience in Africa. After the service she found herself standing inside of the church restroom, staring at herself in the mirror, and whispering, “Am I going to Africa?” Though uncertain whether it was God’s prompting or simply the curiosity of her young girl’s heart longing to be a part of something greater than what was right in front of her, she now attributes meaning to that moment. It was not just a question; it was a premonition of life to come. *What can be said with certainty, as she shared, is that very moment*, “I grasped at the hope that my calling was part of something far greater than I could ever imagine.” That inner desire longing to serve beyond inside the walls of their tiny home, breaking the boundaries of expectations of her upbringing, marked the beginning of her servant leadership journey. While she did not yet have the ability to identify the stirring inside of her, her heart was being drawn to a deeper meaning of leadership that prioritized purpose over position and service over status.

Her continued reflection further described, “My first dream job as a kid was to be a preacher’s wife.” For Pastor Rose, which was the only authentic way she could imagine herself having a role that was close to the pulpit and one that served a congregation that would need her. At that time, Ministering and traveling the world was a distant place in her mind, and ministry felt like her future husband’s story not her own. She refused to ignore that inner desire to serve, as it was already deeply rooted within her, a desire shaped not by selfish ambition or the need for recognition, but by a willingness to give her life in support of those who needed spiritual growth, especially in areas that she could relate to.

This internal call just continued to intensify years later when her husband enrolled in a denominational program that was designed to help individuals find their call to ministry. After completing the program, he determined that clerical ministry was not his path, Pastor Rose remembers the heartbreak of facing the reality that her childhood dream of becoming a pastor’s wife was never going to happen. She describes the days and months after this realization to be filled with grief, sadness, and longing, not just because her childhood dream was now gone, but because she had to identify and discern why she was so heavily burdened by a decision that was solely his. This self-exploration allowed her to discern that maybe the calling was never meant to be his, and maybe the call might actually be her own. In a family and denomination that limited the authority and spiritual gifting of women to its purpose, she internally began to see a new path forming, one that did not require her to serve under a man, but rather to serve God directly and faithfully in her own right. This new awakening was both exciting and frightening, as she knew this declaration would not be met with acceptance from her parents, her elders, and those within her church family.

Pastor Rose continued to wrestle with doubt and purpose. Scripture passages about women being silent in the church repeated in her mind often, as did the cultural voice of her father and church elders that reminded the congregation that women were not supposed to lead from the pulpit. She carried out these conflicts with her throughout the next several years. She continued to serve in her expected roles as a church

organist, caretaker of the church, and volunteering in a diverse number of servant leadership positions. She remembered one night serving at a youth camp and she could feel the immense power of the Holy Spirit urging her to discern what she knew was instilled within her. She stated that she found herself stepping away from the camp and standing outside responding to what she recognized as an internal spiritual voice, she finally said, “Okay, I will do it, but you have to help me. I cannot do this by myself.” She went on to say that after she made that commitment to Him, everything in her felt as though “God smiled upon her,” identifying that moment as a sense of spiritual affirmation.

It was not just a personal decision, it was the ideal definition of servant leadership in its most vulnerable form, surrendering the need to understand and choose obedience to a higher calling, without fully knowing the foreseeable outcome. Yet despite that conversation and commitment to God, many years continued to go by. However, this calling was confirmed again in a quiet moment in her church basement while she was cleaning, where she fondly remembers this as another moment of spiritual confirmation.

She remembers this moment by stating:

It was not a booming voice, but a stillness that required my attention. I dropped to my knees and whispered yes. I also knew I could say no, and I also knew how to hesitate and consider, because this was a serious moment. At that time, I said yes, God I will go wherever you send me. I got up from my knees wondering how I would tell my non-traveling husband I was going to Africa.

In her own words, God did not send her to Africa, but instead He sent her to the pulpit, a place that in many ways felt just as scary as a faraway country. She stated, “it might have been easier to go to Africa. Not only did I have to face my parents, elders, and those who did not believe I should be doing this, but I also had the battle in my own heart over whether or not I truly was meant to lead as a pastor.” That internal battle between surrender and self-doubt, between obedience and family exclusion, is exactly where servant leaders are forged. Pastor Rose did not pursue ministry for the pure desire to be in charge. She responded to a call to serve beyond her home, to sacrifice selflessly, and to build up others in faith, understanding that her journey was yet unpaved.

Family and Community Response

Pastor Rose recalls that one of the hardest parts of her journey into ministry was preparing herself for the future conversation that she was going to have with her parents. Her journey into ministry, although confirmed divinely and supported by her husband, was not going to be welcomed and supported so openly by her parents. Their hesitation and resistance were not rooted in a lack of desire to see her succeed, but in the deeply held theological and cultural beliefs that shaped their religious and cultural views. They together believed a woman’s place in ministry was to serve within the home or in supportive positions inside the church, not at the pulpit within pastoral leadership. The known lack of support that she was about to face created an emotional and spiritual conflict that caused Pastor Rose to again doubt her calling to serve. Even today years later after accepting their position on her calling, she stated, “The call of

God doesn't always come with the applause of those you love, it comes with a responsibility to obey." While her parents did not necessarily agree with her choice, they did support her decision from afar.

It was during a season of faithful service, and not ambition, that the next door opened for her. While working as an organist for a local funeral home, she met a United Methodist Pastor who heard her play and invited her to join a small church to fill a gap in their music ministry. Despite the fact that this was not her home church, nor their denomination, she recognized that feeling of God prompting her to listen and obey once again. She recalls the moment as one of those opportunities, stating, "I knew that I knew that I knew I wasn't supposed to refuse." Her decision to say yes was not about seeking visibility to prove her calling to be true. It was about continued faithfulness, the very heart of servant leadership. Despite the disapproval of her parents, she responded to a clear need in the church, a position that mirrored Christ's model of humble obedience. Robert Greenleaf speaks to servant leadership, stating, "The servant-leader is a humble servant first. It begins with the natural feeling that one wants to serve, often beyond their understanding why" (Greenleaf, 2008). This initial opportunity started with Pastor Rose's recognition that she was simply filling a void inside a church. However, as time moved on God continued to position her and her husband for a new chapter that would soon highlight her calling. Tensions between her new position at the Methodist church and her previous position at the Pentecostal church began to arise, and she and her husband made the difficult decision to leave, she stated, "God had already prepared the way for us."

Pastor Rose's husband, who had grown up in the Methodist tradition, found comfort in returning to his denomination. For Pastor Rose, however, this was an unfamiliar step into her future, one that was again not supported by her parents. Despite stepping into the unknown, what looked like a betrayal of her denominational faith on the outside was, in fact, a deep spiritual integration into a space where her calling as a servant leader would continue to emerge.

In this way, Pastor Rose's journey into the United Methodist Church began to represent more than a denominational choice, it began to reflect the journey that many servant leaders wrestle with between cultural expectations and divine intervention. Her willingness to serve in a new capacity before stepping into visibility modelled that very essence of Christ-like leadership mimicking a space within servant leadership.

Additionally, Pastor Rose's sense of calling emerged during her childhood, shaped by moments of deep reflection and quiet spiritual promptings. Her earliest encounters with ministry aspirations began with a missionary's story that woke something within her, something she now connects with the early voice of God's calling on her life. Though her home life and surroundings distinctly defined women's roles as supportive and behind the scenes, her longing to serve beyond those set limitations never ceased to leave her. This early conflict between obedience and acceptance inspired the kind of self-awareness and moral grounding that form the basis of Authentic Leadership Theory (Walumbwa et al., 2008). Her humility and willingness to serve despite lacking familial support, further exemplify servant leadership as defined by Greenleaf (2008), where true leadership begins with the desire to serve others first. As her journey continued to unfold, Pastor Rose increasingly engaged in leadership rooted in connection, shared growth, and spiritual alignment all pillars of Relational Leadership

Theory, which highlights leadership as collaborative and a values-driven process (Uhl-Bien, 2006).

The continued responses that Pastor Rose received from her family and community were mixed by a complex interplay of support, excitement, scepticism, silence, and judgment. When asked about where the hardest reactions came from, she shared:

My immediate family was just fine with it. My parents and extended family, I believe, also knew some ministry was coming; in whatever form, none of us knew. My dad struggled with it, but we only had one conversation. I presume he made peace with it. There was also much support from my siblings and closest friends. There were additional extended family that openly questioned why I thought I could be a pastor. Others in this group were incredibly supportive and helpful.

These mixed emotions and somewhat limited support she received from her parents and extended family reflected a common reality for many women who find themselves stepping into nontraditional leadership roles, especially when deeply rooted religious and cultural expectations are at the forefront of their direction (Pargament et al., 2000).

Pastor Rose's identification of feeling alone during these pivotal times continues to highlight what research identifies as social exclusion stress, where the absence of familial affirmation can further increase internal doubt, especially for leaders whose callings defy traditional expectations. This emotional experience also aligns with authentic leadership theory, which asserts that leaders develop through moments of personal struggle that require a strong sense of self-awareness and internal moral compass that is often identified as a strong core ideology of one's being (Walumbwa et al., 2008). Rather than being inspired by acknowledgement and approval, Pastor Rose was motivated by a quiet conviction that only she could lean into. She noted that the absence of affirmations created moments that allowed fear and doubt that "could bury me in guilt", specifically when external voices continue to further highlight the cultural messages, she grew up with, messages just as telling her that women were not meant to lead, and that women have a place of silence in the church. As she shared, "Spiritually, it can affect me in this area if I let the opinions of others keep me from doing what God has called me to do. It can bury me in guilt and fear, and at brief moments, it has. Not so much anymore." Her recognition of these emotional phases echo findings in authentic leadership research, which highlights that leaders are shaped by adversity through self-awareness, moral clarity, and internalized values (Walumbwa et al., 2008).

Community reactions continued to complicate her journey. She recalled that "there have been people in nursing homes or hospitals or other places where I go to minister who have been surprised, some not pleased and then some who were thrilled that a woman could be a pastor". These responses continued to range from disapproval to excitement that demonstrated gendered expectations embedded with congregational life. Allured (2022) argues that such reactions reflect both the persistence of cultural norms and the slow transformation occurring as more women begin to make the choice to step into leadership roles that are more visible than before. Furthering highlighting the historical role of Methodist women in advancing leadership and gender justice within the church, illustrating both continuous cultural barriers and the slow transformation of women's roles within religious organizations.

Even within her extended family, resistance was not often subtle. She explained that “the cousins who challenged me directly along with the pastors and others who have strong opinions about women ministers have often scared me, or upset me, most of which were not to my face.” These biased opinions and stereotypes of women in religious leadership roles correspond with research on women clergy who often report indirect criticism, social avoidance, or quiet disapproval as barriers to leadership. (Lomotey, 2025).

Yet despite the external pressures, her sense of calling continued to remain firm. Perhaps the most powerful example of this resilience is her recollection of discerning whether to accept her current pastoral appointment. She recalled:

Just before accepting the appointment to the church in Bloomington where I currently serve, I was at home on a Saturday and felt the need to drive to the other church where I was serving. God and I had a chat. I had to have confirmation before accepting the new appointment. God gave it to me that day. I know He has been patient with my long-time-keep-asking perspective on what I believe God has called me to do.

This moment further demonstrates authentic leadership in its purest form, leading from conviction, guided by values and anchored in spiritual identity rather than external validation.

Pastor Rose also demonstrates a deep sense of humility when she reflected upon her journey compared to others: “I realize that being in a female-accepting denomination, I have not faced the struggles that many women have faced. I love reading about the women who followed their calling when there was not an open denomination for them.” Her awareness aligns with servant leadership’s focus on stewardship and empathy, recognizing the broader struggles of women whose denominational framework offer far fewer pathways.

Despite the resistance she encountered, one voice remained consistently supportive, which was that of her husband.

My husband has been a big supporter. He believes in my calling and my practice as a pastor.” His support reflects the relational dimension of leadership highlighted in Relational Leadership Theory, which suggests that leaders can thrive when trusted relationships reinforce their purpose, resilience, and growth (Uhl-Bien, 2006).

Taken together, the family and community responses to Pastor Rose’s calling highlight not only the emotional burden she carried, but also the strength of her developing core ideology. These layers of affirmation, resistance, silence, and eventual acceptance reinforce the developmental journey that research scholars identify as core transparency to authentic and servant leadership: leaders are shaped through meaningful struggle, guided by purpose, and sustained by relationships that further support their calling.

Overcoming Challenges and Embracing Leadership

Pastor Rose's journey into ministry has not been without struggle, identifying one of her most persistent challenges being the silent judgment of other pastors and community members, both past and present. She recalled that one of her biggest obstacles was overcoming the comments and looks of others when she walked into a room. She stated that "the opinions of other pastors and what people have continuously written about the questioning of female pastors remains unfair at times. Additionally, she states that not feeling comfortable in a men's-only clergy groups was a barrier that she has had to break over time." These experiences reinforced the tension she felt as a woman in a traditionally male-dominated leadership role and reflect what Eagly and Carli (2007) refer to as the "labyrinth of leadership" for women, as often feeling invisible on a path often filled with resistance, contradiction, and misrecognition.

Initially, Pastor Rose found herself feeling out of place and uneasy in predominately male clergy circles, noting that she did not feel comfortable in a men's only clergy group and that there was no such thing as a women's only clergy group. Her discomfort relates to the findings of the relational exclusion that frequently undermines women in leadership (Ibarra et al., 2013). However, she developed spiritual and emotional strategies that helped her to remain resilient during these recurring periods of constantly being questioned. In one powerful moment of discernment, she recalls praying:

I prayed. I begged God to tell me if I was doing something I should not be doing. I told Him if I was not listening to get me fired. I assured Him I would quit this very moment if He wanted me to. He has never answered those questions.

These prayers were not expressions of doubt in her ability to lead, but deep reflections of true authentic leadership, which is grounded in moral clarity and spiritual awareness (Walumbwa et al., 2008). Pastor Rose's inner dialogue and internal conflict reveal the truth of authentic leadership: a commitment to aligning values and actions while remaining committed to one's personal integrity and core ideology.

As her leadership continued to grow, it was transformed in quiet resistance to the continued expectations placed upon her. She humbly shared:

In that meeting with God before this appointment, I finally said to God, "I would rather stand before You and hear You say I wasn't supposed to be a pastor, then to stand before You and have You say to me, why did I let men stop me from doing what I knew you called me to do.

This statement reflects what Ospina and Foldy (2009) discussion of the relationship between leadership, power, context, and agency, specifically how social identifies and structures can both shape and constrain the ways leadership is enacted. This is a type of leadership that arises not from hierarchical power but from conviction, calling, and moral courage. Despite moments of guilt, fear, confusion, and conviction, Pastor Rose highlighted that she has "become less sensitive to the opinions of others" over time, reflecting a testament to spiritual maturity and development of what Greenleaf (2008) termed servant-first leadership in practice.

Although Pastor Rose humbly refrains from claiming leadership success, stating, “I do not consider myself an exceptionally good leader. At times I wonder if I am leading at all. I am often like a church manager than a leader,” *yet* her practices show otherwise. She cultivates trust by ministering at hospitals, nursing homes, and homes of the scared, alone, and dying. She connects with children of all ages by attending their games and performances and shows support and love through communication of texts, emails, visits, and surprise gifts. These acts further highlight principles of authentic leadership (Walumbwa et al., 2008), including relational transparency, ethical behavior, and meaningful engagement with others. When asked about her accomplishments, her answers were also humble and simple. *She stated*, “My accomplishments come from loving and caring for the people, that is what I do that is what I am called to do.” This response continues to align with the servant leadership perspective that true impact is measured not in authority or control but in the flourishing of those served (Laub, 1999). Though she has not faced the extreme hostility some female clergy have had to endure, Pastor Rose remains aware of the persistent theological barriers that some women encounter. She reflected; there are many who are in the 1 Timothy 2:12 camp of ‘no speaking, no authority for women belief.’ Nevertheless, she believes her call has remained firm over time. “God has not left half of the population out because they are female”, *she* declared. Supported by her husband and shaped by a lifetime of prayerful discernment, Pastor Rose closes this season of ministry not with a need to prove herself but with a peaceful resolve. She stated, “In the remaining years that I have as a female pastor, a female leader, I want to do that, just be myself and not try to prove anything, just love people as they are just as Christ loved and accepted me as I am.”

Methodology

This research article utilizes a qualitative narrative interview approach that was based upon reflective data to explore leadership identity and core ideology development within a faith-based organizational context. The narrative is fully grounded in the lived experiences and exploration of the journey of Pastor Rose Sparks, further allowing for an in-depth exploration of how leadership identity is developed through personal reflection, calling, and organizational culture and interaction. All interview responses were reviewed and explored to determine patterns and themes identified within the recurring experiences, ideas, and narratives related to leadership identity, calling, resilience, relational engaged, and the expectations of gender-related roles through a faith-based lens. These recurring patterns were then organized into identified themes and connected to the leadership theories that guided the analysis throughout the exploration.

Specifically, the analysis is informed by Servant Leadership, Authentic Leadership, and Relational Leadership theories, which allowed for a conceptual framework for developing a better understanding of leadership behaviours, decision-making processes, and practice through a faith-based lens. This approach allowed the study to capture the complexity of leadership as a female and spiritually influenced journey within a faith-based organization, shaped by cultural expectations, lived experiences, and leadership practices, while also reflecting upon broader global leadership dynamics within religious contexts.

Results

This research article and narrative analysis reveal that leadership within a faith-based organizational culture emerges through a core ideology that is deeply personal and spiritually guided through a journey that is shaped by cultural expectations and lived experiences that cannot simply be reduced to a one-size-fits all model. Pastor Rose Sparks' story further highlights how leadership identity develops through moments of self-reflection, recognition of one's calling, resistance, and relational engagement, reflecting both individual conviction and broader organizational expectations and influences. Her detailed narration of her experiences demonstrates that leadership is not defined solely by positional authority, but instead by consistent practices of service, resilience, and connection with others. These identified thematic patterns further highlight how female leadership within religious contexts continues to evolve, navigating both structural barriers while also creating new opportunities for influence within both local and global leadership environments.

Discussion

This article explores the narrative responses that address the central question of how leadership identity and core ideology develop together within a faith-based organizational context through a female lens. Through this exploration the responses given by Pastor Rose Sparks further demonstrate that leadership emerges through a combination of spiritual calling, lived experiences, and relational engagement. Her journey reflects key principles and highlights practical applications of servant, authentic, and relational leadership, while also highlighting how leadership is formed and shaped within organizational structures influenced by cultural and theological expectations. From a global leadership perspective, her experiences and her journey further demonstrate how women in leadership roles continue to navigate barriers that are not isolated to once specific context but can be reflected across diverse religious and cultural environments that are globally related.

While this article provides meaningful insight into leadership identity development, is limited to a single narrative case, which may not fully represent the broader experiences of all women in faith-based leadership roles or positions. However, the exploration of this narrative journey offers a valuable understanding of how leadership is developed, experienced, practiced, and sustained within organizational and global contexts. This research helps to contribute to the field of global leadership by expanding the conversation beyond traditional organizational settings and cultures, highlighting leadership development as an ongoing values-driven, relational, and culturally influenced process shaped by one's core ideology. Future research would allow for expansion upon this narrative by continue to explore the leadership lived experiences of women across additional faith-based organizations, denominations, and cultural context within a broaden global landscape.

Conclusion: Embodied Faith and the Future of Women in Religious Leadership

While Pastor Rose's individual journey is rooted in a specific American denominational context, the leadership barriers she faces are globally recognized. Women across

diverse religious leadership contexts in Eastern Europe, sub-Saharan Africa, South Asia, and beyond encounter relatable conflicts between personally identified callings and institutional restrictions, purpose, and cultural expectations. The leadership competencies reflected in her journey, such as servant leadership's commitment to others, authentic leadership's grounding in internal values, and relational leadership's emphasis on trust, may have relevance beyond a single cultural context. These competencies may offer valuable insight for leaders navigating in complex and difficult environments. In this context, Pastor Rose's story extends far beyond a personal narrative and offers an example of leadership emerging from a driving conviction rather than position.

Pastor Rose's narrative is more than a singular journey; it provides an example of leadership theory reflected in application and practice. Her noted experiences resonate deeply with Authentic Leadership Theory (Walumbwa et al., 2008), which highlights self-awareness, relational transparency, and a self-discovered, internalized core ideology. Her consistency in returning to prayer, walking in discernment, pursuing self-growth, and unwavering submission to God's call, despite the resistance and uncertainty for those around her, demonstrates a rare spiritual integrity, moral clarity, and internal discipline to her true core ideology. Her leadership reflects not only selfless behaviour, but an internalized moral compass that she describes as spiritual discernment, aligning closely with authentic leadership's emphasis on values-based self-regulation (Walumbwa et al., 2008).

Equally, her leadership reflects that of the pure essence of Servant Leadership (Greenleaf, 1977), where leadership begins not from a pure desire for power, but from a deep-seated desire to serve others from within. Her role as a pastor has been marked by acts of presence, selfless giving, and meaningful actions, such as conversations held at the bedside, handshakes after church, and hugs to the hurting; all practices that build trust and restore faith in humanity. These micro-acts of leadership, often invisible to institutional power structures, are exactly where the theology of care and Relational Leadership Theory can intertwine (Uhl-Bien, 2006).

For future generations of female religious leaders, Pastor Rose's story serves as both a challenge and a hope. The challenge is to remain rooted and confident in one's defined purpose even when institutions lag affirmation. The hope is that as more female and male leaders embody these values, the path becomes wider, the questions become softer, and the resistance less fierce.

In Pastor Rose's own words: "I would rather stand before You and hear You say I was not supposed to be a pastor, than to stand before You and have You say to me, why did I let men stop me from doing what I knew You called me to do". May her faithful obedience inspire a whole new generation of both men and women to walk boldly into their calling that has been placed upon their lives, with humility, authenticity, and transparency. Even more so, may the unwavering courage to simply be themselves inspire greater empowerment that extends far beyond individual denominations and contributes to the ever-evolving global landscape of religious leadership.

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The Engage–Amplify–Pipeline Framework: Audience Engagement and Sustainability in a Regional Orchestra

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Abstract

Background: Regional symphony orchestras play a vital role in preserving culture and fostering community connections; however, many face challenges in sustaining audience engagement and ensuring long-term relevance. **Objectives:** This study developed a diagnostic framework for audience engagement and sustainability in regional orchestras by examining engagement, educational outreach, digital interaction, and perceptions of accessibility through an in-depth case study of a mid-sized regional orchestra in Indiana, American Midwest. **Methods:** Guided by serious leisure theory, cultural capital theory, audience segmentation, and nonprofit sustainability frameworks, this study employed a sequential explanatory mixed-methods design to analyze the data. Survey data were collected from current audience members ($n = 79$), local educators ($n = 19$), and community residents ($n = 68$), supplemented by nine semi-structured qualitative interviews coded using NVivo matrix analysis across 19 thematic categories (484 references). Descriptive statistics identified general patterns of participation, while thematic analysis of the interviews illuminated motivations, perceptions, and lived experiences. **Results:** The findings indicate that meaningful emotional experiences drive repeat attendance, whereas barriers such as scheduling, limited awareness, and perceived exclusivity limit broader participation, particularly among younger audiences. Educational programming produces exceptional educator-reported outcomes but remains largely invisible in the broader communities. **Conclusions:** This study offers the Engage–Amplify–Pipeline (EAP) framework as a diagnostic model for regional orchestras navigating audience engagement and sustainability challenges, derived from and illustrated through a mixed-methods case study. The implications for leadership strategy, audience development, and nonprofit sustainability are discussed, along with considerations for applying this framework to comparable institutions.

Keywords: audience engagement; regional orchestra; nonprofit sustainability; mixed-methods; cultural capital; arts leadership

Paper type: Research article

Introduction

Regional symphony orchestras face sustainability challenges that are both local and national in scope. Across the U.S., organizations are grappling with structural pressures related to changing audience behaviors, the development of new and younger audiences, constrained financial resources, and evolving patterns of cultural participation (League, 2024; Ostrower, 2024). Industry data indicate that audience behavior has changed since the COVID-19 pandemic. While younger patrons account for a growing share of ticket purchases, and new ticket buyers accounted for 40% of all sales in 2023, orchestras continue to face challenges in converting new ticket buyers into sustained participation and in maintaining support from existing patrons (League, 2024). Within this broader context, regional orchestras occupy a distinctive and often precarious position as they seek to sustain their artistic excellence, financial stability, and community engagement. For Indiana's oldest professional orchestra, the Terre Haute Symphony Orchestra (THSO), founded in 1926, this challenge is both immediate and of generational significance (Terre Haute Symphony Orchestra, n.d.).

The Terre Haute Symphony Orchestra (THSO), founded in 1926, is the oldest professional symphony orchestra in Indiana (Terre Haute Symphony Orchestra [THSO], n.d.). The organization provides a subscription concert series, chamber performances, educational concerts, and school tours, reaching approximately 3,000 fourth-grade students throughout the Wabash Valley and more than 75 free community engagement and education events each season (THSO, n.d.). However, like many orchestras nationally, the THSO operates in a changing audience and cultural environment. National orchestra data indicate shifts in audience composition, including an increase in ticket buyers and donors under the age of 60, as well as changes in ticket sales, subscriptions, and audience engagement strategies (Nelson & Yair, 2024). Within this context, the present study examines the extent to which THSO's community engagement activities are associated with awareness, participation, and patronage among residents of the Wabash Valley, with particular attention to younger community members.

The challenges facing THSOs are neither unique nor parochial. The League of American Orchestras (2024) documents comparable demographic patterns and audience development challenges across U.S. orchestras, while research from the Royal Philharmonic Orchestra (2022, 2024) and Tröndle et al. (2025) identifies related patterns in European orchestral audiences in the UK. Therefore, findings and frameworks derived from a rigorous empirical examination of one regional institution could carry meaningful transferability for the field of global arts leadership, particularly for the substantial population of mid-sized orchestras that share THSOs' combination of institutional quality and regional positioning.

This study was designed to empirically examine these dynamics and, based on the examination, to develop a diagnostic framework that regional orchestras can apply to their audience engagement and sustainability challenges in the future. Using the Terre Haute Symphony Orchestra as an in-depth case study and employing a sequential explanatory mixed-methods design that integrates three survey instruments with qualitative semi-structured interviews, this study investigates four interrelated research questions and, based on its findings, derives a transferable strategic model for the broader field of regional arts management.

Research Questions

RQ1: Which demographic and psychographic factors are associated with sustained audience engagement in regional orchestras

RQ2: How does participation in educational programming and digital engagement influence community perceptions of accessibility and attendance motivation in the context of a regional orchestra?

RQ3: What barriers commonly limit broader community participation in regional orchestras, and what strategies can be used most effectively to reduce them?

RQ4: How can the integrated findings inform a strategic model for sustainability that is applicable to comparable regional orchestras?

The central research hypothesis is that the THSO's sustainability challenge is not primarily a question of the breadth or existence of its artistic and educational programming but rather a visibility and audience-development pipeline problem. The THSO maintains an established portfolio of professional performances, educational programming, and community engagement activities (Terre Haute Symphony Orchestra [THSO], n.d.). The most consequential strategic work ahead lies in connecting existing programming and community impact to community members who are unaware of its existence and are not participating.

Theoretical Framework

This study is grounded in four intersecting theoretical traditions that provide a robust framework for understanding audience behavior in art organizations. Serious leisure theory (Stebbins, 2015) characterizes sustained participation in cultural activities as an identity-forming pursuit defined by perseverance through challenges, skill acquisition, and the accumulation of social capital within an institutional community. For highly loyal orchestral patrons, attendance is not merely an act of aesthetic consumption but a component of personal and civic identity, with direct implications for donor cultivation and retention strategies.

Cultural capital theory (Chan & Goldthorpe, 2007) situates classical music attendance within the structures of educational attainment and social stratification, predicting that individuals with higher educational exposure are more likely to engage with such institutions. This framework is essential for understanding the current demographic profile of the THSO audience and the structural challenges in extending participation across educational and socioeconomic boundaries.

Audience segmentation research (Tröndle et al., 2025) provides a typological lens for differentiating motivational and behavioral patterns across patron groups, enabling more targeted communication and programming strategies than a unified model would. Tröndle et al.'s classification of visitor types, including Aesthetically Engaged, Community Champion, and Ambivalent Visitor, informs both the analysis of psychographic survey data and the strategic framing of audience development recommendations for the future.

Nonprofit sustainability theory (Moldavanova & Wright, 2020; Vidican-Teohari & Brancu, 2025) conceptualizes organizational viability as extending beyond operational

efficiency to encompass the alignment of organizational strategy, community relevance and sustainability. Moldavanova and Wright's (2020) examination of nonprofit arts organizations, together with Vidican-Teohari et al.'s (2025) integrated approach to sustainability in performing arts management, provides a theoretical foundation for the EAP framework introduced in this study.

Methodology

This study employed a sequential explanatory mixed-methods design (Creswell & Creswell, 2023), in which quantitative survey data were first collected and analyzed, followed by qualitative interview data to elaborate on the quantitative findings. This design is particularly appropriate when descriptive patterns in survey data generate interpretive questions that structured interviews can address with greater nuance than closed-ended instruments can. A single-institution case design was deliberately selected for model development. Triangulating multiple data sources and stakeholder populations within one institution allows the resulting framework to be built on methodological depth before its broader application and testing across sites, an approach consistent with case-based theory-building traditions in organizational research.

Participants and Data Collection

Three survey instruments were administered during the spring 2026 concert season: a current audience survey distributed via THSO email and social media channels (n = 79), an educator survey distributed to teachers who had participated in THSO's Adventure Concert educational programming (n = 19), and a community survey distributed through Wabash Valley community Facebook groups, local organizational networks, and direct outreach (n = 68). The instruments were designed to assess demographic characteristics, psychographic motivations, engagement history, perceptions of barriers, and awareness of THSO programs.

Following the quantitative data collection, nine semi-structured qualitative interviews were conducted via telephone and Zoom web conferencing platform with audience members who volunteered for follow-up participation at the conclusion of the audience survey. The interviews lasted approximately 15–30 min and explored the participants' motivations, emotional experiences, perceived organizational strengths, and recommendations for improvement of the program. All procedures were approved by the Institutional Review Board of Saint Mary-of-the-Woods College prior to data collection (approval date: March 12, 2026). Participation was voluntary, and all responses were anonymized using pseudonyms.

Data Analysis

Survey data were analyzed using descriptive statistics, and frequencies and percentages were calculated for all categorical and Likert scale items. Owing to the sample size limitations, the findings are presented as descriptive and exploratory rather than inferential. Formal hypothesis testing results were interpreted as directional patterns relevant to the research questions rather than as definitive statistical conclusions.

Qualitative interview data were analyzed using NVivo matrix coding across 19 predetermined thematic categories derived from the research questions and theoretical framework. A total of 484 coded references were produced across all nine

interviews, enabling a quantitative comparison of thematic salience across participants and the systematic identification of convergent and divergent patterns. The sequential design facilitated integration at the interpretive stage, where quantitative patterns were examined alongside qualitative themes to generate a more complete explanatory account than either research method could provide alone.

Limitations

The sample sizes across all three survey populations were sufficient for descriptive analysis but insufficient for inferential statistical tests. The intended total of 300 respondents was not achieved; the actual totals of 79, 19, and 68 constrained the ability to detect medium-effect size relationships with adequate statistical power. Therefore, all quantitative findings should be interpreted with caution. Additionally, the qualitative interview sample was drawn entirely from self-selecting current audience members, underrepresenting the perspectives of non-attenders and lapsed patrons. Longitudinal data and organizational financial records were unavailable for this study, precluding more comprehensive sustainability modeling. As a single-institution case study, the EAP framework proposed here should be understood as a starting model derived from the empirical patterns of one regional orchestra in Japan. Its indicators and thresholds have not yet been tested across multiple institutions, and applying and refining the framework in comparable regional orchestras is an important area for future studies.

Disclosure of Artificial Intelligence Use

AI tools (specifically, Claude by Anthropic) were used to assist with manuscript formatting, structural organization, and editing for clarity and conciseness during the preparation of this manuscript from the original thesis. All ideas, analyses, interpretations, theoretical arguments, and conclusions are the author's original contributions. All data collection, analysis, interpretation, and framework development were conducted exclusively by the author using NVivo matrix coding, descriptive statistical analysis, and original theoretical synthesis. The AI did not analyze the research data. All AI-assisted content was reviewed, revised, and verified by the author to ensure accuracy, alignment with the original research data, and consistency with APA 7th edition standards.

Results

RQ1: Demographic and Psychographic Predictors of Engagement

As shown in Table 1, the current audience demographic profile ($n = 79$) was consistent with national benchmarks for regional orchestras but was significantly skewed toward older cohorts. Sixty-nine percent (69.6%) of respondents ($n = 55$) were over the age of 55, while only 8.9% ($n = 7$) were between 18 and 35 years. Educational attainment was uniformly high: 87.1% held a bachelor's degree or higher, 42.3% held a master's degree, and 17.9% held a doctoral degree. Household income was similarly elevated, with 65.8% of participants reporting annual incomes above \$50,000. These patterns align with the cultural capital theory's prediction that classical music attendance correlates with higher educational attainment and acquired cultural competencies (Chan & Goldthorpe, 2007; öndle et al., 2025).

Audience tenure was deep: 38% of respondents had attended THSO performances for more than ten years, and 38% attended four to five events per season. Only 9%

attended for the first time. These attendance patterns are consistent with the characterization of sustained cultural participation as identity-forming and reinforced by social belonging in serious leisure theory (Stebbins, 2015).

Psychographically, respondents were asked to select all the attendance motivations that applied; supporting the local arts community was the most frequently cited (68%, $n = 56$), followed by specific repertoire or composers (63%, $n = 52$), guest artists (38%, $n = 31$), and socializing with friends or family (34%, $n = 28$). The primacy of community support as a motivational frame suggests that for many THSO patrons, attendance functions as an act of civic investment, a distinction that has direct implications for cultivating such donors. Audience members motivated by institutional loyalty rather than programmatic preferences may be more responsive to philanthropic appeals grounded in community impact than to specifics of artistic programming.

Table 1
Demographic Profile of Current THSO Audience Members (n = 79)

Characteristic	Category	n	%
Age	18–35	7	8.9%
	36–55	17	21.5%
	> 55	55	69.6%
Education	High school / Some college	10	12.8%
	Bachelor's degree	21	26.9%
	Master's degree	33	42.3%
	Doctoral degree	14	17.9%
Income	< \$50,000	10	12.2%
	\$50,000–\$100,000	27	32.9%
	\$100,000–\$300,000	27	32.9%

Note. Percentages may not sum to 100 because of rounding and prefer not to say" responses.
Source: Author's analysis of current audience survey data (2026).

RQ2: Educational Programming and the Digital Gateway

The educator survey ($n = 19$) yielded uniformly positive assessments of the THSO educational programming. Seventy-four percent of educators rated the most recent THSO program as excellent ($n = 14$), and 21% rated it as very good ($n = 4$); no educator rated the program as fair or poor. Student engagement was similarly exceptional: 60% of educators ($n = 12$) reported that students were very engaged during the program, and 35% ($n = 7$) reported extremely engaged. Combined agree and strongly agree responses exceeded 95% for both age-appropriateness and curriculum alignment. As indicated in Table 2, 84% indicated that they were very likely to request another THSO program, 95% were very likely to recommend THSO to colleagues, and 84% were very likely to encourage student families to attend a concert, constituting a net promoter profile that is rarely achieved in arts-education assessment.

Table 2

Educator Survey Key Findings: Program Ratings and Future Engagement Intent (n = 19)

Measure	Top Response Category	n	%
Overall Program Rating	Excellent	14	74%
Student Engagement	Extremely Engaged	7	35%
Age-Appropriate Content	Strongly Agree / Agree	19	100%
Curriculum Connection	Strongly Agree / Agree	19	100%
Will Request Again	Very Likely	16	84%
Will Recommend to Colleagues	Very Likely	18	95%
Will Encourage Families to Attend	Very Likely	16	84%

Note. The percentages reflect valid responses; one to two respondents did not answer all items.

Source: Author's analysis of educator-survey data (2026).

Against this backdrop of programmatic excellence, a striking finding from the community survey revealed that 53% of community respondents (n = 36) were unaware that THSO offered educational programs in local schools before completing the survey. This constitutes a value invisibility problem: the organization produces exceptional community impact through educational channels that the community is unaware of. The National Endowment for the Arts (2023a) reported that 75% of adults participated in the arts through electronic or digital media in 2022, while 82% reported engaging with arts activities through digital media between 2021 and 2022 (National, 2023). Limited awareness of an organization's educational mission and community impact may reduce community members' motivation to attend and engage (OECD, 2022).

RQ3: Barriers to Broader Community Participation

Community respondents who expressed low attendance likelihood (n = 56, multi-select item) identified scheduling and timing of events as the most frequent barrier (n = 16, 28.6%), followed by lack of awareness of upcoming events (n = 13, 23.2%), ticket prices (n = 7, 12.5%), and programming that does not appeal (n = 6, 10.7%). This barrier profile diverges meaningfully from national audience research, in which affordability remains a significant consideration for cultural participation (LaPlaca, 2021). Within the THSO community sample, ticket cost ranked third, consistent with the current audience finding that 96% of active patrons rated THSO ticket prices as very affordable or fairly priced. The data suggest that non-attending community members may harbor unfounded cost assumptions that proactive pricing communication can address.

Venue accessibility received the lowest mean satisfaction score of any measured experience dimension among current audience members (M = 4.46), with stairs repeatedly identified in open-ended responses as a physical barrier. This finding is significant given that 69.6% of the current audience was over 55 years old, a cohort that is increasingly susceptible to mobility limitation. Accessibility-centered design can signal institutional values in ways that extend beyond those directly affected by access barriers (LaPlaca, 2021).

Qualitative interview data corroborated and contextualized these findings. The NVivo matrix analysis coded Engagement Factors (n = 78, 16.1% of all references) and Community Connection and Belonging (n = 48, 9.9%) as the most frequent thematic categories, substantially outweighing barrier-related themes, which accounted for 71 of the 484 references (14.7%). This asymmetry is theoretically meaningful; even among participants who reported accessibility or scheduling concerns, the narrative weight of what makes THSO compelling consistently exceeds that of what hinders participation. Barriers are real and addressable; however, from the perspective of current participants, they are not a dominant issue.

Table 3

Community-Reported Barriers to THSO Attendance (n = 56, Multi-Select)

Barrier	n	% of Respondents
Scheduling or timing of events	16	28.6%
Was not aware of upcoming events	13	23.2%
Ticket prices	7	12.5%
Programming does not appeal	6	10.7%
Accessibility concerns	5	8.9%
Parking or transportation	4	7.1%
No one to attend with	3	5.4%

Note. Respondents could select all applicable barriers. The percentages reflect the proportion of 56 the respondents.

Source: Author's analysis of the community survey data (2026).

RQ4: The Engage–Amplify–Pipeline (EAP) Framework

The integration of quantitative survey patterns with qualitative thematic elaboration produces a more coherent and consistent picture: the THSO maintains an artistically strong, educationally impactful, and community-valued institution, whose primary sustainability vulnerability is reach rather than quality. Three cross-population convergences structure this conclusion.

First, quality was not an issue in this study. Eighty-two percent of current audience members rated the concert experience as excellent or good, 100% of educators rated educational programming positively, and 75% of community respondents reported a positive impression of the THSO. Interview coding confirmed these assessments through the high frequency of Emotional Response (n = 32) and Overall Experience Perception (n = 36) references.

Second, awareness was a problem. Fifty-three percent of community residents were unaware of THSO's educational programming, and 27% reported no familiarity with THSO's offerings. Digital and Social Media Outreach was coded 17 times in the interview matrix, and Awareness and Information Gaps eight times, corroborating survey evidence that the organization's communications infrastructure does not match the quality of its artistic product.

Third, demographic risk is both structural and compounded by other factors. The 60-percentage-point gap between the over-55 cohort (69.6%) and the combined under-35 cohort (8.9%) is consistent with the national patterns of arts participation (National, 2023). However, this is particularly consequential in regional markets, where

alternative professional orchestral offerings are limited and the educational pipeline for new audience development is concentrated in a small number of institutions.

These three convergences provide the empirical foundation for the Engage–Amplify–Pipeline (EAP) framework, as indicated in Table 4, which organizes the strategic implications of this study into three, interdependent imperatives.

Table 4
The Engage–Amplify–Pipeline (EAP) Strategic Sustainability Framework

ENGAGE	AMPLIFY	PIPELINE
<i>Retain and deepen the current audience</i>	<i>Make organizational excellence visible to the community</i>	<i>Convert education participants into the next generation of patrons</i>
• Venue accessibility audit • Evening scheduling flexibility • Proactive pricing communication • HVAC resolution at Tilson Auditorium	• Weekly mission-driven digital content • Educator testimonial amplification • Behind-the-scenes musician storytelling • Social media advocacy activation	• Educator Ambassador Program • Flexible young patron ticketing • Post-concert social programming • Young professional network events

Note. The EAP framework was derived from the integrated mixed-methods findings of this study. These imperatives are interdependent and mutually reinforce one another.
Source: Author’s illustration (2026).

Discussion

The findings of this study contribute to the literature on audience engagement, nonprofit art sustainability, and regional orchestral leadership. By advancing the understanding of these interconnected domains, this study illuminates the complex dynamics that influence audience development, organizational resilience, and leadership practices within regional orchestras.

Serious Leisure Theory in a Regional Context

This study reinforces the applicability of serious leisure theory (Stebbins, 2015) to regional orchestral audiences while identifying a dimension of community identity, civic pride, and institutional investment that is more salient in regional markets than in metropolitan ones. For the Terre Haute Symphony Orchestra’s most loyal patrons, attendance is not merely aesthetic consumption or social recreation but an expression of civic commitment to a community institution. This finding has direct implications for donor cultivation: messaging that connects ticket purchases and philanthropic contributions to community outcomes, youth development, cultural identity, and economic vitality may be more effective with this audience than programming-focused appeals. Moldavanova and Wright (2020) suggest that nonprofit arts organizations that strategically align their missions and community engagement are better positioned to strengthen their long-term sustainability and community impact.

The Digital Gateway in Regional Markets

This study provides empirical grounding for the digital gateway phenomenon (National, 2023; Royal, 2024) in a mid-sized regional market, where dynamics differ from those of metropolitan organizations. In larger cities, orchestras benefit from ambient visibility

through advertising, media coverage, and cultural density. Visibility must be actively constructed in regional markets. The finding that 53% of community residents were unaware of the THSO's educational programming despite its high quality and extensive reach suggests that in regional markets, a digital content strategy is not supplementary to sustainability planning but is foundational to it.

The Royal Philharmonic Orchestra (2024) documented significant changes in orchestral audiences, finding that newcomers to orchestral music now outnumber long-time classical music enthusiasts. Its research also demonstrated particularly strong engagement among younger audiences: an earlier RPO study found that 65% of people under 35 regularly listened to orchestral music, compared with 57% of those aged 55 and older, while younger audiences were substantially more likely to engage with orchestral music through streaming, online videos, podcasts and social media (Royal, 2022). These findings suggest that digital engagement and contemporary content delivery methods represent meaningful opportunities for regional orchestras to expand their awareness and develop younger audiences.

Filling a Gap in Nonprofit Sustainability Research

The EAP framework introduced in this study responds to the identified need for empirically grounded approaches to sustainability and audience development in regional orchestral institutions (Ostrower, 2024; Vidican-Teohari & Brancu, 2025). Existing research has examined organizational strategy, sustainability, and audience development in nonprofit arts organizations (Moldavanova & Wright, 2020; Ostrower, 2024). The EAP framework differs from existing models in several ways: it prioritizes leveraging existing programmatic strengths rather than prescribing new programming investment; foregrounds communications and digital visibility as strategic imperatives rather than operational afterthoughts; and explicitly addresses the pipeline challenge, the long-term challenge of converting educational participants into future audience members and donors, as a primary sustainability concern rather than a secondary mission objective.

Simjanovska and Karjalainen's (2022) finding that orchestras that increased community outreach by 40% demonstrated significantly higher financial resilience provides empirical support for the Amplify and Pipeline imperatives as financially, not merely mission-relevant, strategic priorities. The Giving USA Foundation (2025) documented that arts giving rose by 9.5% in 2024, the highest growth rate in the nonprofit sector, suggesting that the philanthropic moment for cultivating younger donors is open and that organizations with strong educational pipeline programs are well positioned to capitalize on it.

Practical Recommendations

Based on the integrated findings and the EAP framework, this study offers seven prioritized recommendations for the THSO and comparable regional orchestral institutions. These recommendations are designed to leverage existing strengths rather than require wholesale programmatic transformation and to be implemented within realistic resource constraints.

First, an Educator Ambassador Program should be established that formalizes the relationship with 95% of educators who expressed a high likelihood of recommending THSO to colleagues. Providing participating teachers with shareable digital content,

short video clips of student experiences, social media graphics, and templated family communication letters would extend THSO's community reach through trusted institutional channels at a minimal cost.

Second, launch a mission-driven digital content strategy organized around three pillars: behind-the-scenes musician storytelling, documentation of educational program impact, and patron and educator testimonials to build a community around the program. Content should be distributed consistently on a weekly basis across platforms relevant to the target demographics and explicitly linked to ticket purchases and educational objectives.

Third, daytime, outdoor, and alternative format programs should be expanded to address the scheduling conflicts identified as primary barriers to non-attenders. Open-air summer performances, afternoon chamber ensemble events in community venues, and informal public-space concerts would collectively address scheduling, accessibility, and perceived exclusivity barriers while reaching audiences who identify community and outdoor events as their preferred format.

Fourth, address venue accessibility as a strategic priority through a comprehensive audit in partnership with disability access specialists, followed by either structural improvements or clear and proactive accessibility communication describing available accommodations, accessible seating, elevator access, and parking proximity to the venue.

Fifth, implement proactive ticket pricing communication that addresses the perception gap between actual affordability (96% of current patrons find prices very affordable or fairly priced) and cost assumptions that rank pricing as the third community-reported barrier to attendance.

Sixth, resolve the Tilson Auditorium temperature conditions, identified by 38% of educators as the single most consistently cited operational barrier in an otherwise excellent experience.

Seventh, develop a Young Patron Pipeline Initiative incorporating flexible ticketing architectures, young professional networking events aligned with concert programming, and post-concert social components that create informal community gathering opportunities, the engagement format most frequently cited by interviewees as meaningful for converting new attendees into regulars.

Conclusion

This study examined audience engagement, educational outreach efficacy, and community perceptions of accessibility at a mid-sized regional orchestra using a sequential explanatory mixed-methods approach. Its central finding is both diagnostic and hopeful: the organization maintains an artistically strong, educationally impactful, and community-valued institution whose most pressing sustainability challenge is not quality but visibility and pipelines. The distance between an organization's demonstrated excellence and the next generation of audience members is not a quality problem to be solved through programmatic overhaul, but a communications and pipeline problem to be addressed through strategic investments in digital visibility, educator relationships, and young patron cultivation.

For the global community of arts leadership scholars and practitioners, this study demonstrates that the methodological combination of multi-population survey data and NVivo-coded qualitative interviews offers a replicable and high-yield approach to the diagnostic challenges facing regional orchestral institutions in the United States. The EAP framework is designed with transferability explicitly in mind: its three imperatives—engaging existing audiences, amplifying organizational excellence into the broader community, and building an educational pipeline into future patronage—address dynamics that are structurally common across regional orchestral institutions in the United States, Canada, the United Kingdom, and comparable international cultural contexts. Regional orchestras that sustain community relevance strengthen not only their own institutions but also the broader global ecosystem of live orchestral music and the civic values it embodies (Moldavanova & Wright, 2020; OECD, 2022).

The EAP framework proposed in this study offers a structured and empirically grounded response to this challenge, which is possibly replicable across comparable mid-sized regional orchestral institutions and applicable to the broader field of nonprofit arts management. As the research literature on nonprofit sustainability consistently documents, organizations that fail to renew their audiences face eventual irreversible decline (Moldavanova & Wright, 2020; Vidican-Teohari & Brancu, 2025). The Terre Haute Symphony Orchestra and the field of regional orchestral leadership more broadly have the institutional quality, community goodwill, and programmatic foundation to prevent this outcome. This study provides an evidence-based framework to do so deliberately, efficiently, and in a manner that builds on genuine strengths rather than importing generic solutions into communities that deserve and require approaches responsive to their own cultural landscapes.

This study was limited by its single-site design and sample size, which precluded formal inferential statistical testing. Future research should pursue multi-institutional comparative designs across Midwestern regional orchestral markets, longitudinal tracking of educational program participants to directly assess pipeline conversion rates, and structured focus group inquiry into community messaging preferences to inform the development of digital-content strategies.

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Pioneering New Fields of Study: Lessons and Reflections from the Nascent Field of Global Leadership

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Abstract

Background and Objectives: In the hope that other scholars can learn from our experiences, we share the strategies and steps we have taken to advance the nascent field of global leadership over the past two and a half decades. **Approach:** We begin by discussing the meaning and requirements of a field of study. After identifying the external drivers that enabled global leadership's growth, we mention the individual champions who devoted time and effort to growing the field. We acknowledge global leadership's multidisciplinary roots and the challenges of creating a construct definition that distinguishes global leadership from related fields. **Results/Conclusion:** We acknowledge the major contributions that emerged from a partnership with Emerald Group Publishing's *Advances in Global Leadership* series and discuss the variety of approaches we took to expand the field's reach within the social sciences.

Keywords: global leadership, birthing new fields of study, multi-disciplinary fields of study, theory-building, construct definition

Paper type: Critical Essay, Perspective & Reflection Essay

"We are not students of some subject matter but students of problems. One's problems may cut right across the boundaries of any subject matter or discipline"
(Popper, 1962, p. 67).

Introduction

As Karl Popper's quotation states, a field like global leadership definitely deals with problems that "cut across the boundaries of any subject matter or discipline." This might explain why many of the scholars who write on this topic are cross-cultural management scholars housed in schools of business with some type of international experience in their background and a propensity for cross-disciplinary collaboration. We know from observation that some new fields persist while others fade (e.g., Crocq, 2013; McGail, 2021), but there is surprisingly little research on the topic of how academics or administrators develop a new field of study.

The closest model might be the practical lessons for building a research community and developing a coherent field of study in the new field of teacher leadership (Berg, Carver & Mangin, 2018). However, few of the steps they reported compared to the trajectory we experienced in growing the field of global leadership. We found in their work some practical suggestions for modifying the focus of university departments in response to a changing environment. For example, the University of Uruguay modified their development studies program by adopting an interdisciplinary focus on research, teaching, and institution building (Arocena & Sutaz, 2016). Although the field of global leadership has multidisciplinary roots in the fields of intercultural communication competence, expatriation, global management, and comparative leadership (Osland, 2018), it is more likely that individual global leadership teachers (or traditional leadership teachers who are branching out to teach a global leadership course) seldom need to figure out how to work with professors from those other disciplines. Usually, they simply educate themselves by reading global leadership texts that explain the field's multidisciplinary roots or seek out advice or key readings in the other disciplines.

Our purpose in this paper is to explain how and why the field of global leadership developed in the hope that it provides a potential pathway for other scholars engaged in novel research. A secondary purpose is to encourage scholars to carry out global leadership research.

The Definition and Role of Fields of Study

Most scholars identify themselves as belonging to a specific 'field of study,' but are seldom called upon to reflect on what that term implies or requires. Kuhn (1970) maintained that each field of study should have its own paradigm to allow for more advanced research and that their existence is a sign of maturity and development within a scientific field. He defined paradigms as "universally recognized scientific achievements that for a time provide model problems and solutions to a community of practitioners"

(Kuhn, 1970, p. viii). Based on Kuhn's 1970 definition, Anand, Larson, & Mahoney (2020) observe that paradigms are the constellation of the "fundamental ideas, methods, language, and theories that are accepted by the members of a scientific community," and are critical to a field's progress given that "no natural history can be interpreted in the absence of at least some implicit body of intertwined theoretical and methodological belief that permits selection, evaluation, and criticism" (Kuhn, 1970, pp. 16–17). Sulkowski & Lenart-Gansiniec (2025: 1) provide the following overarching summary of the concept: "a paradigm is a valid worldview, a way of seeing the world" within the cadre of researchers within a given discipline.

As research in a scientific field progresses, findings often occur that are not easily explained by or are not in conceptual harmony with the accepted paradigm. If such findings accumulate, they may cause a "paradigm shift" in the field. "This process can include revision or rejection of previously accepted theories and the emergence of new theoretical frameworks. Consequently, paradigm shifts drive progress and improvement in the state of knowledge about management science" (Sulkowski & Lenart-Gansiniec, 2025, pp. 1–2).

The field of global leadership does not yet have one paradigm universally accepted by all researchers; it is in what some scholars call a "pre-paradigmatic" phase. This is common for an emerging field. Kuhn notes that:

History suggests that the road to a firm research consensus is extraordinarily arduous... In the absence of a paradigm or some candidate for paradigm, all of the facts that could possibly pertain to the development of a given science are likely to seem equally relevant. As a result, early fact-gathering is a far more random activity than the one that subsequent scientific development makes familiar. (Kuhn, 1970, p. 15).

Despite being in a pre-paradigmatic phase, the nascent field of global leadership does meet some of the other requirements for a social scientific field. For example, Darden (1978) argued that fields of study need the following: a central problem, a domain of items accepted as facts related to that problem, general explanatory factors, expectations about how problems should be solved along with techniques and methods for doing so, and concepts, laws and theories related to the central problem. The central problem of global leadership is determining how to simultaneously lead effectively within and across organizations, nations, and cultures in complex environments in an overarching global context.

Given the wide variety of problems that global leaders face and the way the field has developed, we found Cassadevall and Fang's (2015) definition and description of fields of study very helpful. They define fields of study, not just as topic matter, but as *a fundamental sociological unit of science* (Cassadevall & Fang, 2015), since members themselves choose where they want to specialize and with whom they want to work. Their acceptance depends in part on others working in the field. In addition to providing a sense of belonging and community to researchers, fields of study maintain information and

provide normative standards for scientific work. Although there is limited research concerning why new fields of study are born and how they develop, Cassadevall and Fang (2015) suggest that they occur naturally as both information and scientific specialization increases, aided by the growth of research communities with similar interests.

Thus, a scientific field can be defined as a collection of individuals with a common interest in some aspect of science who regularly interact and hold common interests and goals (Cassadevall & Fang, 2015). New fields of study come into being and progress by defining important problems to tackle that are often in response to a “grand challenge” or an external significant “felt need” within the context of an existing field (George, Howard-Grenville, Joshi, & Tihanyi, 2016). This was true for the field of global leadership and the dynamics of its formation will be summarized in the next section. Our experience in participating in the formation of the field of global leadership is that the human element is essential to building a field of study and the following sections discuss how both subject matter and human choices and interactions contributed to developing the current state of the field of global leadership.

Phase 1: Existence of a Felt Need

We argue that at least two prerequisites must be in place for the birth of a new field: 1) external conditions that legitimize the field (drivers) and 2) individuals who see the need for development and are willing to work at building the field (champions).

External Drivers

The exponential increase in all the following drivers in the late 1990s to the early 2000s created the need for global leadership competence in both international and domestic organizations: globalization’s impact in terms of global exports’ percentage of world GDP, foreign sales, Foreign Direct Investment, access to formerly closed countries like China, global supply chains, and the rapid development of electronic technologies. Previously, it was primarily expatriates and diplomats who were concerned with how to lead and manage people from other countries. However, globalization meant that many more managers had to rapidly acquire global leadership skills, regardless of their physical location, and they also had to deal with the increased complexity of a globalized world. Lane, Maznevski, and Mendenhall (2004) argued that this complexity consists of four components: 1) *multiplicity* (the number and type of issues that must be dealt with), 2) *interdependence* (the necessity of dealing with more and different competitors, customers, governments, stakeholders, and NGOs), 3) *ambiguity* (lack of information clarity, unclear cause-and-effect relationships, and equivocality regarding information), all of which occur in an environment characterized by 4) *flux* (an environment characterized by non-linear, ongoing shifting in terms of system dynamics, values, organizational structure, industry trends, and socio-political stability). Another external driver was the push by AACSB (the accrediting body for business schools in higher education) in the mid-1980s for business schools to carry out more international research. This paved the way for global leadership research to be viewed as important and

legitimate in academe. External drivers are necessary, but insufficient for a new field to germinate. People, in the form of champions, are also needed to spearhead new fields.

Champions

Academic champions are scholars who see the necessity for research in a new area and devote their time and effort to both leading and researching that field. Champions constitute a critical mass of scholars who are willing to leave behind, to some degree, the comfort of their established research streams to risk entering unexplored realms where established research domains, norms, and publishing protocols may not yet exist. Historically, some of the earliest publications on global leaders were interviews or practitioner-oriented articles written by consultant-scholars. The first empirical global leadership research surfaced in the 1990s, with some of the seminal work being done by scholars (who previously had focused their research efforts largely in expatriate effectiveness, general leadership, and cross-cultural management) such as: Wills and Barham (1994), Young and Ready (1995), Adler (1997), Black, Morrison and Gregersen (1999), and Kets de Vries and Florent-Treacy (1999). Some of these foundational researchers continue to publish in the field. For recent reviews of global leadership research, see Osland, Neilsen, Mendenhall & Bird (2020) and Osland (2018).

Phase 2: Individual and Team Efforts to Develop Global Leadership as a Field of Study

In addition to researching and publishing on global leadership, many other scholars helped develop the field in a variety of ways. Beginning in 2001, we began working with a loosely-coupled team of researchers at different universities who actively collaborated to advance the emergent field of global leadership: Nancy Adler, Allan Bird, Paula Caligiuri, Harry Lane, Martha Maznevski, Mark Mendenhall, Rikki Nielsen, Gary Oddou, Asbjorn Osland, Joyce Osland, Sebastian Reiche, Günter Stahl, Michael Stevens, Betina Szkudlarek, and Sully Taylor. Most had prior experience working and living abroad, which explained their interest and dedication to this new field of study. As you can see from the following examples, some champions had academic chairs or positions focused on leadership, which made it possible for them to support this field within the university setting.

- For instance, Mark Mendenhall's chaired position at the University of Tennessee-Chattanooga allowed him to convene in 2001 what was probably the first meeting of scholars on the topic of global leadership. He challenged them to create a model of global leadership development, which resulted in what came to be known as the "Chattanooga Model of Global Leadership Development" (Mendenhall, Osland, Bird, Oddou, Stevens, Maznevski & Stahl, 2007).
- Another team effort that contributed some of the basic building blocks for the new field of global leadership occurred when Harry Lane, Martha Maznevski, and Mark Mendenhall co-edited a book on global management, entitled *The Blackwell Handbook of Global Management* (2004). The book was co-written with members of the International Organizations Network (ION), a loosely

coupled organization of international management scholars. Years later, Mark made another significant contribution by publishing the online global leadership teaching techniques he developed in 2019.

- A writing collaboration led by Mark Mendenhall also produced four editions of *Global Leadership: Research, Practice and Development* (2008, 2013, 2018, and 2026) with co-authors Joyce Osland, Allan Bird, Gary Oddou, Martha Maznevski, Guenter Stahl, and Michael Stevens. This compendium, which updates the primary research areas in global leadership, is frequently used in doctoral programs.
- Both the history and the predicted future of the field of global leadership can be found in the *SAGE Handbook of Contemporary Cross-Cultural Management* (Osland, Neilsen, Mendenhall & Bird, 2020).
- Allan Bird's chaired position at Northeastern University enabled him to host some annual global leadership conferences for academics, practitioners, and students.
- Nancy Adler publicized an innovative transdisciplinary program at the Lahore University of Management Sciences in Pakistan that partners with communities and external organizations to provide students with practical experience that builds global leadership skills. The program's founder, Dr. Arshad Ahmad, was honored as the 2022 Academy of International Business International Educator of the Year (Arshad & Adler, 2025).
- Joyce Osland's position as the Lucas Endowed Professor of Global Leadership at San Jose State University allowed her to co-found and direct the Global Leadership Advancement Center and Global Leadership Lab (GLLab) for twelve years. In addition to funding her global leadership research, this position supported a global leadership speaker series for the university and the community, certificate programs in Global Leadership for undergraduates and graduates, a Global Leadership Fellows Program for outstanding undergraduates, and an annual Global Leadership Lab exchange program with a German university, which also served as a global leadership teacher-training program for interested professors from other universities and disciplines. (Most of these programs did not survive her retirement.)

Other scholars championed the field by incorporating global leadership workshops and presentations into large academic conferences and accepting positions as journal editors and reviewers. For example, teams of global leadership scholars organized and presented professional development workshops at numerous Academy of Management conferences on topics such as: "What Is Global Leadership?" "Researching and Publishing in Global Leadership," and "Teaching Global Leadership." As a result, more scholars found their way into the field and were often offered a helping hand with respect to research and teaching. Some scholars served as guest-lecturers or visiting teachers of global leadership courses in doctoral programs that had no global leadership scholars on staff. Several senior scholars in the field actively mentored doctoral students from universities that did not have global leadership scholars on their faculties. Additionally, instructors published articles on developing global leadership courses to help teachers design global leadership courses of their own (Vora, 2020; Ly, 2022). These activities exemplify Cassadeevall and Fang's (2015) view of fields of study as a collection of individuals who both hold and interact around common interests and goals. Additionally,

these activities reflect Cassadevall and Fang's (2015) contention that outsiders – especially young scholars – to the field should be welcomed as new members and that barrier entries to entering the field should be non-existent.

Phase 3: Dealing with Obstacles and Resistance to a New Field of Study

According to Charlton (2008), the three phases on the road to acceptance of new theories are: 1) the theory is not true; 2) the theory is true, but it is unimportant; 3) the theory is true, and it is important – but we knew it all along. While we were not proposing new theory in the beginning, we did have to overcome some initial resistance to global leadership as a field of study. Cassadevall and Fang (2015) observed that if new fields gain traction and create publishing outlets, that due to the peer review process, their members can also impede progress by preventing access by outsiders and restricting new thinking, thereby sustaining dogma. Conversely, we found that this tendency operates in the opposite manner as well, when scholars researching new phenomena attempt to publish their findings in long-accepted journals in the wider field. This is not unusual in the wider field of management, as experienced for example, by qualitative researchers: (Howard-Grenville, Nelson, Vough, & Zilber, 2021; Paavilainen-Mäntymäki & Plakoyiannaki, 2025). The same was true for global leadership scholars whose early work was often rejected by the reviewers of top journals who were unwilling to consider a new paradigm outside their own field of traditional leadership. Thomas Kuhn (1970: 5) aptly summarized this tendency in academe when he observed that “normal science, for example, often suppresses fundamental novelties because they are necessarily subversive of its basic commitments” and thus undermines its foundations or requires the reconstruction of prior assumptions.

The way forward for scholars working in a new field is to simply persevere in the face of opposition, and that is what has occurred in the field of global leadership. To illustrate the growth of the field, we conducted a backward search in Google Scholar for every 10 years of articles or books or papers that had “global leadership” specifically in the title of the publication. From 2015 to 2025 the search reported “about 2,510 results.” From 2004-2014 it reported “about 1,390 results” and for publications from 1994-2004 (the general time period when the global leadership field was formed and in its infancy), it reported “about 389 results.” Finally, from 1960-1993 the search revealed “about 42 results.” This trend and the increasing number of publications that focus on global leadership as the main topic of their research seems to indicate a current acceptance of global leadership as a separate field of study from that of traditional leadership. For more critical analyses of the growth of the field please see: Mendenhall, Honorio Franco de Lima, & Burke-Smalley (2023); Mendenhall, Li, & Osland (2016); Vijayakumar et al., 2019).

Phase 4: Differentiation from Other Fields

As we mentioned in the preceding section, one of the first requirements in establishing a new field of study is to distinguish it from other fields. International scholars had studied

leadership in various ways, which led to confusion. We had to distinguish global leadership from cross-national leadership, cross-cultural leadership, and especially comparative leadership. This task was more difficult because much of the early research on global leadership was qualitative in nature and suffered from the absence of a construct definition that would distinguish it from other fields and support stricter selection practices.

Defining Global Leadership

Sebastian Reiche, Allan Bird, Mark Mendenhall and Joyce Osland assumed the challenge of creating a construct definition of global leadership. After months of hard work, they proposed the following definition of global leadership and encouraged scholars to improve upon it: “The process and actions through which an individual influences a range of internal and external constituents from multiple national cultures and jurisdictions in a context characterized by significant levels of task and relationship complexity” (Reiche, Bird, Mendenhall, & Osland, 2017, p. 556). In the same article, they created a typology of ideal roles for four types of global leaders so that scholars could distinguish them for research purposes. Whether or not this definition stands the test of time, it was developed to help prevent global leadership scholars from “comparing apples and oranges.” This means that global leadership scholars will be more likely to include only actual global leaders in their studies if they adhere to this definition when choosing participants for their research studies.

Distinguishing Global Leadership from Traditional Leadership

Part of developing the field meant explaining the difference between traditional and global leadership. We often use the analogy of traditional sports versus extreme sports: global leadership, like extreme sports, is more complex and demanding and requires additional skills. For example, McCall and Hollenbeck (2002) reported that the developmental path for global leaders differed from that of domestic leaders in that significant others and cultural experiences played a greater role. We found both similarities and differences in degree and kind (e.g., different job demands, prevalence of boundary spanning, pressure to understand a wider range of stakeholders, heightened ambiguity, and need for cultural understanding) between expert global leaders and domestic leaders (Osland, Bird, & Oddou, 2012; Osland, Oddou, Bird, & Osland, 2013).

Distinguishing Global Leadership from Global Mindset

The global mindset concept (Levy, Beechler, Taylor, & Boyacigiller, 2007) indicates that human resources need to be as complex as their environment in order to deal appropriately with diverse perspectives, strategies, and practices. Levy and her colleagues (2007) define global mindset as “a highly complex cognitive structure characterized by an openness to and articulation of multiple cultural and strategic realities on both the global and local levels, and the cognitive ability to mediate and integrate across this multiplicity” (p. 244). In our view, global mindset is a key competency of global leaders that we include in our global leadership courses. However, a key step in

developing global leadership as a field necessitated distinguishing it from global mindset. Two studies clarified this distinction – the first by Osland, Bird, Mendenhall, & Osland (2006;) and the second by Osland, Bird & Mendenhall (2013).

Distinguishing Global Leadership from Comparative Leadership

Another early criticism of global leadership was that it was not a new field of study, but simply an extension of comparative leadership. Comparative leadership is defined as “the differences in traits and practices across countries that explain what is universal in leadership versus what is uniquely influenced by country context and institutions” (Von Glinow & Schnepfer, 2013). Certainly, global leaders require a good understanding of comparative leadership with respect to the countries in which they operate and with their international employees, managers, clients, and business contacts. Otherwise, they could not comprehend and adapt to the differing leadership expectations held by people from other countries. However, understanding comparative leadership is only one aspect of the cognitive and behavioral demands made upon global leaders.

Therefore, when Joyce Osland was asked by William Mobley to take over his role as the senior editor of *Advances in Global Leadership (AGL)* in 2014, she requested that this dual book/journal series cease publishing comparative leadership research and focus solely on global leadership, in accordance with the series title. She argued that including both types of research contributed to construct confusion and that comparative leadership authors could more readily find other outlets for their work. Fortunately, Emerald agreed to the narrower focus, even though it initially meant fewer submissions. Pooja Vijayakumar subsequently spearheaded a bibliometric literature review that identified thematic patterns of leadership in the global context and clarified the difference between global leadership and comparative leadership (Vijayakumar, Morley, Heraty, Mendenhall, & Osland, 2019). These thematic patterns in global leadership research were:

- Differentiation of global leaders from domestic leaders.
- Determining the competencies that should be used as selection criteria for development programs, assignments or promotions.
- Development and/or validation of global leadership assessment instruments.
- Identification and analysis of global leader cognition.
- Construct definition of global leadership.
- Distinguishing between global managers and global leaders.

Phase 5: Answering Key Research Questions

As we look back over the years, it seems to us that Vijayakumar et. al's 2019 thematic findings coincide well with our own observations. In our experience, three key questions seemed to primarily drive research in the field in its early beginnings: 1) “What distinguishes global leaders from traditional leaders?” 2) “What competencies do global leaders need?” and 3) “How do global leaders develop their expertise?” Because definitions of traditional leadership often include change agency, some research focused on how expert global leaders dealt with global change. One research team used cognitive

task analysis (CTA) (see Crandall, Klein & Hoffman, 2006) to identify the cognitive demands on expert global leaders and learn how they think and act (Osland, 2010, 2013; Osland, J., Osland, A., Bird, & Oddou, 2013). This research stream yielded case studies, knowledge audits, and a cognitive demands table pertaining to the processes that expert global leaders employed in global change efforts (Osland, Ehret & Ruiz, 2017). Knowledge audits identified the elements of expert cognition that global leaders utilized, the cues and strategies they employed, and the perceived difficulties novices might experience (Osland, et al, 2017). This knowledge helped to distinguish global leaders from traditional leaders and contributed to both the construct definition of global leadership and global leadership development methods.

Another important contribution to the field was Bird's (2018) categorization of the 230+ competencies identified in global leadership research. While very interesting, this was too many competencies to be helpful when it came to selecting and training global leaders. He therefore divided this complexity of competencies into three conceptual categories to house them: 1) Business Knowledge and Acumen, 2) Managing People and Relationships, and 3) Managing Self. This effort enabled scholars to more clearly view the roles that specific competencies played in global leadership effectiveness and allowed for more refined competency development program design for training purposes. The research findings on expert global leaders also helped address the field's third key question concerning how global leaders develop their expertise by informing global leadership teaching methods and providing teaching cases (e.g., Osland, et al, 2017). Other foundational research in the area of global leadership development was contributed by McCall & Hollenbeck (2002); Caligiuri & Tarique (2012); Mendenhall, Weber, Arnardottir & Oddou (2017); and Dunn-Jensen, Osland, & Wells (2021).

Phase 6: Identifying Foundational Research in Global Leadership

An observation we made early was that some scholars jumped into the field without first being grounded in the history of its evolution or the seminal studies important to its growth. We began developing bibliographies and lists of seminal research for scholars entering the field. Table 1 is a shorthand version of that list.

Table 1 Examples of Foundational Studies in Global Leadership

Areas of Focus	Research
Construct Definition	Reiche, Bird, Mendenhall, & Osland (2017)
Scope of Global Leadership Tasks	Caligiuri (2006); Osland, Oddou, Bird, & Osland (2013)
Global Leadership Behaviors	Huesing & Ludema (2017); Johnson, Ludema, & Osland (2023); Hinds & Ludema (2023)
Global Leadership Competencies and Skills	Wills & Barham (1994); Black et al. (1999); Gitsham et al. (2008); Bird, Mendenhall, Stevens, & Oddou (2010); Caligiuri & Tarique (2010)

Areas of Focus	Research
Global Leadership Assessment and Instrumentation	Kets de Vries, Vrignaud, & Florent-Treacy (2004); Bird, Mendenhall, Stevens, & Oddou (2010); Bird & Stevens (2013); Cumberland, Herd, Alagaraja, & Kerrick (2016); Richter, Schlaegel, Taras, Alon, & Bird (2023)
Women Global Leaders	Adler (1997, 2001); Adler & Osland (2016)
Training & Development	McCall & Hollenbeck (2002); Caligiuri & Tarique (2012); Mendenhall, Weber, Arnardóttir, & Oddou (2017); Dunn-Jensen, Osland, & Wells (2021)
Responsible Global Leadership	Pless, Maak, & Stahl (2011, 2012); Miska, Stahl, & Mendenhall (2013); Pless & Borecka (2014); Mendenhall, Žilinskaitė, Stahl, & Clapp-Smith (2020)

Source: Authors' compilation

Phase 7: Identifying Research Gaps and Growing the Body of Research

Cassadevall & Fang (2015) argue that it is crucial for a field to define key problems and encourage scholars to continue identifying and defining its most important unsolved problems. Doing so is the first step toward finding solutions that can be generalized to practice. Furthermore, the discussions that result from simply listing problems often promotes new scientific directions. Beginning with volume 11, the AGL co-editors (Martha Maznevski, Mark Mendenhall, Joyce Osland, Sebastian Reiche, and Betina Szkudlarek) decided to take yet another step in advancing the field by choosing important global leadership research topics that were not sufficiently addressed in the extant literature for each volume. Thus, each Call for Papers announced that one could still submit on any general global leadership topic, but submissions were also solicited to fill a specific, important research gap in each volume. To be helpful to authors, they briefly mentioned existing research in the chosen problem area and provided potential research suggestions to prime the pump. Furthermore, each volume included a commissioned literature review that detailed the special topic's history and a final chapter by the editors that summarized the research progress and gaps on the topic to guide future research by scholars and doctoral students. The topics we chose to advance the field were:

- AGL 11: University Efforts Related to Global Leadership Development
- AGL 12: Foundational Global Leadership Research
- AGL 13: Interdisciplinary Research on Global Leadership
- AGL 14: Global Leadership Effectiveness
- AGL 15: Power and Global Leadership
- AGL 16: Addressing Society's Grand Challenges Through Global Leadership
- AGL 17: Resilient Global Leadership

This gamble paid off in that AGL was apparently able to fill crucial research gaps while still attracting general research submissions related to global leadership. Choosing

volume topics was in keeping with Cassadevall and Fang's (2015) suggestion that fields of study progress by accurately defining the next important problems to tackle. The authors have also tried to advance and promote global leadership research by publishing frequent literature reviews on the overall field of global leadership in AGL. Our rationale for this is to aid scholars who are outside the field to quickly grasp the field's extant knowledge and perceive the research gaps they could fill. Another way that we "market" the global leadership field is via conference presentations. In every presentation, we define the field and distinguish it from traditional leadership, explain its importance, share a slide on the foundational research, and list the major research gaps that we encourage researchers to fill.

Most of the doctoral programs specializing in global leadership seem to be located in the United States and serve practitioners rather than future academics. For a description of some of these programs, see Tolstikov-Mast, Bieri, Walker, Wireman & Vaiman (2018). Nevertheless, all the U.S. programs require dissertations, which is where we have an opportunity to influence their research plans. We have developed relationships with several of these schools, either teaching, guest-lecturing or doing workshops for them. We use this opportunity to describe the progress scholars have made in producing foundational research and point out key research gaps that have yet to be studied. At least three excellent award-winning global leadership dissertations and two outstanding cases have resulted from these efforts and contacts.

Another way we have tried to advance the field is by promoting cross-disciplinary collaborations. Cassadevall & Fang (2015) argued that because fields are somewhat like tribes, new fields should consciously avoid the tribalism that results in conformity and boundaries between groups by encouraging researchers to branch out into other fields to promote cross-fertilization. By focusing on what is good for science rather than what is good solely for a field of study and by encouraging interdisciplinary exchanges, such tribalism can often be avoided.

Looking back, we tried to follow their admonition. For example, one of the authors invited outstanding teachers from different international fields and universities to a teaching forum. Everyone shared their best practices and then gave useful recommendations on a global leadership course and workshop. Similarly, in the 2025 volume of AGL (volume 16), outstanding scholars from 13 different fields of study (work-family relations, intercultural communication, international education, inclusive leadership, team dynamics, careers, anthropology, diversity, language, global mobility, ethics, practitioner/applied management, and international business) were invited by the editors to identify useful theories and linkages between their fields and global leadership, and to offer recommendations for integration and cross-pollination. Hopefully, the resultant connections and novel ideas will advance various fields of study and prevent the field of global leadership from becoming rigid or inward-looking. At present, perhaps the strongest reflection of such integration is between global leadership and the field of responsible leadership, which has birthed a new sub-field: responsible global leadership (Mendenhall, Miska, & Stahl, 2020).

In summary, over the course of the past two and a half decades, we have seen the field of global leadership take hold and establish itself within the umbrella of the field of management. This is evidenced by a variety of factors:

- The increase in the number of global leadership doctoral dissertations and doctoral programs. It should be noted that most of the US-based programs are targeted at practitioners. (Mendenhall, Li, & Osland, 2016; Tolstikov-Mast, et al, 2018).
- The increase in the number and quality of academic and practitioner publications and conference presentations (Vijayakumar et al., 2019 ; Mendenhall, et al, 2023).
- Increased number of publications in a wider range of journals (Mendenhall et al, 2016).
- Increased number of university course offerings on global leadership. (Osland, Li, Petrone & Mendenhall, 2019; Tolstikov-Mast, et al, 2018).
- Publication of textbooks on global leadership (Mendenhall, et al 2018 & 2026;
- Increased university emphasis on developing competencies and experiences in global leadership. (Ly, 2022; Oddou & Mendenhall, 2026; Osland, et al, 2019)
- Incorporation of global leadership competencies into established university programs, such as study abroad programs, global classrooms, and work study programs in other countries. (Oddou & Mendenhall, 2026).
- Growing inclusion of global leadership in handbooks and encyclopedias. (Mendenhall, 2019; Mendenhall & Reiche, 2023).

An extremely successful academic once stated that the road to success for a researcher is to be either a mortician, who successfully disproves an established theory, or a midwife who gives birth to a new theory. While our focus was not limited to theories and our goal was not limited to academic success, we found that helping to birth a new field of study and to think strategically about what was needed to advance the field was extremely professionally rewarding. We hope this overview of our journey in helping to develop a new field of study is useful to those who choose to join the field of global leadership as researchers as well as to those who are committed to developing other new fields of study. For those who desire to conduct research in the field, but are new to it, our best piece of advice is to reach out to scholars who are currently working in the field and seek their guidance and counsel. Our experience has been that global leadership is a field that tends to attract researchers that are not only passionate about the topic, but in general are kind, helpful, and collegial by nature. It is a rewarding field to be a member of.

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About the Authors



Joyce Osland's master's degree in social work led to community development work and supervising the social work program in Peace Corps Colombia. She spent several years working in international development doing baseline studies, employee training, and supervising departmental turn-arounds in African and Latin American countries.

Her interest in organization development led her to Case Western Reserve's Ph.D. program in Organizational Behavior where David Kolb invited her to update his experiential OB textbooks. This greatly influenced her approach to teaching and training. As a professor at INCAE in Costa Rica, she taught and consulted

throughout Latin America. Her focus on developing the new field of global leadership was also influenced by teaching at the Summer Institute for Intercultural Communication. The exposure to top scholars in that field helped her work with global leaders.

Joyce's final academic position was Lucas Endowed Professor of Global Leadership and Executive Director and founder of the Global Leadership Advancement Center at San Jose State University. She was a visiting professor in various doctoral programs and an active consultant. After retiring, she continued to serve as senior editor of *Advances in Global Leadership (Emerald)*, and to co-author the *Global Leadership: Research, Practice and Development* series (Routledge) and other publications.

Joyce was president of the *Western Academy of Management* and received various service, research and teaching awards throughout her career. As a former senior partner of The Kozai Group, she was an expert on using assessment instruments to build global competence in general and specifically in global leaders.

(continued)



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Global Leadership in the World of AI: Steps for Ethical Application

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Abstract

Background: This poster offers a practical approach to global leadership when introducing artificial intelligence (AI) into culturally diverse organizations. **Methods/Approach:** The approach draws from leadership theory, emerging research on AI in the workplace, and cross-cultural communication theory. Through this research, The Ethical AI Competency Model and AI Implementation Protocol were developed. **Objectives:** The Ethical AI Competency Model highlights six interconnected competencies: Cultural intelligence, Ethical AI Stewardship, Sensemaking and Strategy, Human-Oriented AI Application, Cross-Cultural Communication, and AI Literacy (Chee et al., 2025; Hagerty & Rubnov, 2019; Oh et al., 2026; Passlack et al., 2026; Yang et al., 2025). **Results:** Grounded in this competency model, the AI Implementation Protocol offers a seven-step protocol to support responsible and culturally inclusive AI adoption. **Conclusions:** At its core, the framework argues that successful AI implementation within global leadership necessitates human-centered values, organizational transparency, and the willingness and knowledge to adapt across cultures (Pillai, 2024; Rezaei et al., 2024).

Keywords: Servant Leadership, Global Leadership, Faith-Based Leadership, Women in Leadership, Narrative Analysis, Core-Ideology

Paper type: Poster

Poster

GLOBAL LEADERSHIP IN THE WORLD OF AI: STEPS FOR ETHICAL APPLICATION

ABSTRACT

This poster offers a practical approach to global leadership when introducing artificial intelligence (AI) into culturally diverse organizations. The approach draws from leadership theory, emerging research on AI in the workplace, and cross-cultural communication theory. Through this research, The Ethical AI Competency Model and AI Implementation Protocol were developed. The Ethical AI Competency Model highlights six interconnected competencies: Cultural Intelligence, Ethical AI Stewardship, Sensemaking and Strategy, Human-Oriented AI Application, Cross-Cultural Communication, and AI Literacy (Chee et al., 2025; Hagerty & Rubnov, 2019; Oh et al., 2026; Passlack et al., 2026; Yang et al., 2025). Grounded in this competency model, the AI Implementation Protocol offers a seven-step protocol to support responsible and culturally inclusive AI adoption. At its core, the framework argues that successful AI implementation within global leadership necessitates human-centered values, organizational transparency, and the willingness and knowledge to adapt across cultures (Pillai, 2024; Resael et al., 2024).

BACKGROUND

In setting out to offer global leaders guidance for ethically implementing AI in the workplace, the researchers examined leadership theory, including trait-based and transformational leadership approaches. While these theories ground leadership, they do not presently address the growing technological disruption from AI (Carbonell-Valin et al., 2025). Power dependence theory suggests that those who fully understand AI will be able to strengthen their voice in the workplace and have more power and influence (Liu et al., 2025). In the global workplace, AI is redefining what it means to be a leader and how to obtain leadership roles. Global leaders must then understand how to adapt to AI and the ways it changes the workplace, while still building trust and collaboration across cross-cultural teams (Passlack et al., 2026).

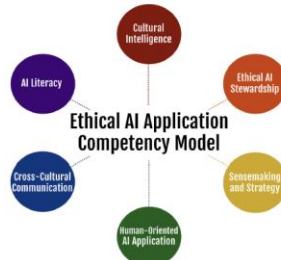
METHODS

This poster synthesizes leadership theory, global leadership research, and AI ethics literature to identify core leadership challenges and responses in AI-enabled, culturally diverse organizations (Bannor & Baysah, 2025; Bird & Mendenhall, 2016; Scott & Klein, 2022). Based on the research, key insights were identified and integrated into the AI Ethical Competency Model, along with a seven-step Ethical AI Implementation Protocol for application of these competencies in the workplace. Global leaders must possess an understanding of AI and its outputs, a commitment to communicating across cultural lines, and a willingness to maintain human-centered, transparent approaches (Rasheed, 2026; Passlack et al., 2026).

RESULTS

The Ethical AI Competency Model is the result of emerging AI research and key insights. This model defines the foundational principles for global AI leadership and serves as the grounding for a seven-step Ethical AI Implementation Protocol. Together, these elements provide actionable guidance for ethical, culturally responsive AI adoption and leadership decision-making (Bannor & Baysah, 2025; Nisioi et al., 2025; Passlack et al., 2026).

ETHICAL AI COMPETENCY MODEL:



AI IMPLEMENTATION PROTOCOL:



CONCLUSION

Ethical and effective AI leadership requires cultural intelligence, accountability, and transformational influence. The research shows that traditional leadership methods will not adapt with AI's demand for change. This framework offers practical tools for global leaders to align AI adoption with human-centered values across diverse cultural contexts (Trimboli, 2025). Additional research will be necessary in understanding the impact on a human-centered approach in this new digital, AI-driven age. (Fleischman, 2024).

PRESENTER BACKGROUND

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Michael King, Ph.D. Student

Saint-Mary-of-the-Woods College, Global Leadership Studies

REFERENCES



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Journal of Excellence in Global Leadership

Global Leadership In the World of AI:
Steps for Ethical Application

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Over the past decade, Dani has supported organizations through periods of growth and change, with experience spanning higher education, nonprofits, and corporate environments. She brings a steady, people-centered approach and focuses on aligning systems and day-to-day operations with what an organization is working to achieve.



Michael King is a Ph.D. student in the Global Leadership Studies program at Saint Mary-of-the-Woods College. Professionally, he serves as a Community Mental Health Specialist at The Jed Foundation, where he supports community-based organizations in strengthening the positive impact of their policies, programs, and practices on youth mental health. Through this work, Michael

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