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Hispanic Women Business Executives' Self-Perceptions of Leadership Effectiveness

Daniel R. Dusch
Walden University

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Walden University

College of Management and Technology

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Daniel Dusch

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Walden University
2015

Abstract

Hispanic Women Business Executives' Self-Perceptions of Leadership Effectiveness

by

Daniel R. Dusch Jr.

MST, Seton Hall University, 2000

BS, University of Pittsburgh, 1989

Dissertation Submitted in Partial Fulfillment

of the Requirements for the Degree of

Doctor of Philosophy

Applied Management and Decision Sciences

Walden University

February 2015

Abstract

Hispanics will become the majority ethnic group in the U.S. by 2060. The social and business cultural changes affected by these demographics are inevitable and will require leadership from academic and business communities in order to ensure clear direction for the future. Gender research in managerial and professional positions mostly includes White women and typically excludes those of other racial, ethnic, and cultural backgrounds. The research problem was that there is little known about the lived experiences of Hispanic women business executives. The purpose of this phenomenological study was to explore the self-perceptions of leadership effectiveness of Hispanic women business executives. A conceptual lens informed by the concepts of intersectionality, bicultural competence, and emotional intelligence guided this study. Purposive sampling was used to obtain 12 participants for face-to-face interviews. Research questions focused on self-perceptions of leadership style, the ways they enact leadership, and their contributions to organizational effectiveness. Interpretative phenomenological analysis was used to analyze the data and member checking helped assure trustworthiness of interpretations. The findings revealed that the participants acquired effective leadership skills through their diverse contact with other people and cultures. The potential positive social change impact includes a contribution to existing literature by increasing scholars' and business-peoples' understanding of this group's lived experiences; creating more leadership opportunities for Hispanic women; identifying areas for self-development, thereby improving leadership and decision making; and clarifying expectations for young Hispanic women considering executive leadership as a career path.

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Dedication

This dissertation is dedicated to my wife whose support, and personal sacrifice without which this would not be possible—she did it out of love. And my children who never asked for more than I could give, and their faith in that I would eventually reach my goal. My hope is that I can exemplify that hard work, and perseverance will lead to a better life.

Acknowledgments

With many well-wishers along the way, what at times seemed a solitary journey, it could not have been accomplished without the support of patient and dedicated friends. My heartfelt thanks to my Chairperson Dr. Joseph Barbeau. I met Joe at a residency in Hawaii and felt aloha. At the appropriate time, Joe agreed to chair my committee and guided me to this end. Also on my committee, Dr. David Gould. Dave's matter-of-fact advice provided the impetus for overcoming methodological challenges. And my University Research Review (URR) committee member, Dr. Howard Schechter, who oversaw my dissertation review and approval process. The support of all my committee members was meaningful to the quality and success of my dissertation.

I feel fortunate to have had this experience. The study participants were an integral part of this project, and I want to express my appreciation to them for their time and effort. I learned something from each of them as they recounted their experiences. What struck me the most was their graciousness and openness. They seemed to me truly caring people, and I feel that is a significant factor underlying their successful relationships.

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Chapter 1: Introduction to the Study

Thirty-four percent of the change in the U.S. total population, from 2010 to 2060 (projected), is attributable to an increase in women of Hispanic origin (U.S. Census Bureau, 2012a, 2012b). The U.S. Census Bureau (2012b) projected that the Hispanic population will increase dramatically through 2060, and so should the number of Hispanic women available and willing to assume business leadership roles. However, Hispanic women in the management, professional, and related occupations have the lowest U.S. civilian labor force participation rates when compared by race and ethnicity; additionally, the projected long-term trend is that low participation rates will persist through 2050 (Toossi, 2006; U.S. Bureau of Labor Statistics, 2014a; U.S. Census Bureau, 2014). This study fills a gap in the literature by complementing existing work in the field concerning the occupational underrepresentation of Hispanic women and particularly Hispanic women business executives.

Chapter 1 includes the background for the study and presents statistics concerning the occupational underrepresentation of Hispanic women in the management, professional, and related occupations. I also introduce the problem statement (i.e., need for the study), purpose statement (i.e., intent of the study), and the research questions addressed during the course of this study. I provide brief descriptions of the relevant theories, the conceptual framework, and nature of the study as well as definitions, assumptions, scope and delimitations, limitations, and the significance of the study. Chapter 1 also includes a framework for the study and a preview of Chapter 2 and Chapter 3.

Background of the Study

Globalization and labor market transformation affect the lives of individuals and organizations (Acker, 2004; Gauchat, Kelly, & Wallace, 2012; Meyer, 2003; Sampaio, 2004; Wallace, Gauchat, & Fullerton, 2011). There are two Federal Agencies responsible for measuring changes in demographics and economies. The U.S. Department of Commerce: U.S. Census Bureau serves as “the leading source of quality data about the nation’s people and economy” (U.S. Census Bureau, 2014, p. 1). The U.S. Department of Labor: U.S. Bureau of Labor Statistics is responsible for the collection, analysis, and dissemination of “essential economic information to support public and private decision-making” that includes measurements of labor market activity, working conditions, and economic price changes (U.S. Bureau of Labor Statistics, 2014b, para. 1). The data provided by these two agencies is designed to serve diverse user communities, and distinct categories have been defined that focus measurements on areas of social significance such as reporting population trends, projecting civilian labor force requirements, or providing data for evaluating the effectiveness of social policies. The foundational development of this study used pertinent data provided by these agencies.

Hispanic Population Trends in the United States

The U.S. Census Bureau (2012a, 2012b) projected that the total U.S. population will increase by 111 million people or 36% between 2010 and 2060 (projected). Figure 1 shows the percentage of population change by race and ethnicity in relation to the total population change 2010 to 2060 (projected).

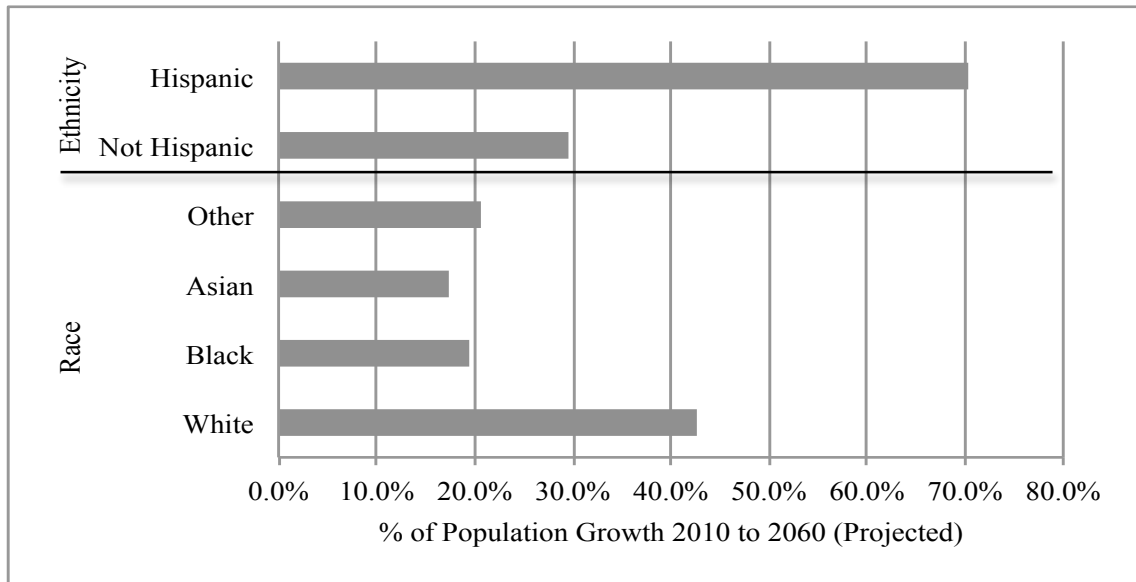


Figure 1. U.S. population growth percentages 2010 to 2060 (projected) by race and ethnicity (U.S. Census Bureau, 2012a, 2012b). Adapted from Table 3. Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States: April 1, 2010 to July 1, 2011 (NC-EST2011-03) (U.S. Census Bureau, 2012a); Table 4. Projections of the Population by Sex, Race, and Hispanic Origin for the United States: 2015 to 2060 (NP2012-T4) (U.S. Census Bureau, 2012b).

In 2010, the Hispanic population represented 16% of the total U.S. population, with 8% being men of Hispanic origin and 8% being women of Hispanic origin (U.S. Census Bureau, 2012a). In comparison, the 2060 (projected) Hispanic population will represent 31% of the total U.S. population with 16% being men of Hispanic origin and 15% being women of Hispanic origin (U.S. Census Bureau, 2012b). Figures 2 and 3 show the U.S. population 2010 actuals and 2020 to 2060 projections by sex and ethnicity.

2010 Actuals and 2020 to 2060 Projections of the Population by Sex and Hispanic Origin for the United States									
Sex and Hispanic origin	(Resident population as of July 1. Numbers in thousands)							Increase 2010 vs. 2060	% Increase 2010 vs. 2060
	2010	2020	2030	2040	2050	2060			
BOTH SEXES	309,330	333,896	358,471	380,016	399,803	420,268	110,938	36%	
NOT HISPANIC	258,540	270,111	279,816	285,140	288,072	291,488	32,948	13%	
HISPANIC	50,790	63,784	78,655	94,876	111,732	128,780	77,990	154%	
MALE	152,096	164,812	177,323	188,335	198,770	209,663	57,567	38%	
NOT HISPANIC	126,312	132,241	136,948	139,473	141,151	143,236	16,924	13%	
HISPANIC	25,784	32,570	40,375	48,862	57,619	66,427	40,643	158%	
FEMALE	157,234	169,084	181,148	191,681	201,034	210,605	53,371	34%	
NOT HISPANIC	132,228	137,870	142,868	145,667	146,921	148,251	16,023	12%	
HISPANIC	25,006	31,214	38,280	46,014	54,113	62,353	37,347	149%	

Figure 2. 2010 actuals and 2020 to 2060 projections of the population by sex and Hispanic origin for the United States (U.S. Census Bureau, 2012a, 2012b). Adapted from Table 3. *Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States: April 1, 2010 to July 1, 2011 (NC-EST2011-03)* (U.S. Census Bureau, 2012a); Table 4. *Projections of the Population by Sex, Race, and Hispanic Origin for the United States: 2015 to 2060 (NP2012-T4)* (U.S. Census Bureau, 2012b).

2010, 2020 to 2060 Percentages of the Population by Sex and Hispanic Origin for the United States							
Sex and Hispanic origin	(Resident population as of July 1.)						Change 2010 vs. 2060
	2010	2020	2030	2040	2050	2060	
BOTH SEXES	100%	100%	100%	100%	100%	100%	100%
NOT HISPANIC	84%	81%	78%	75%	72%	69%	30%
HISPANIC	16%	19%	22%	25%	28%	31%	70%
MALE	49%	49%	49%	50%	50%	50%	52%
NOT HISPANIC	41%	40%	38%	37%	35%	34%	15%
HISPANIC	8%	10%	11%	13%	14%	16%	36%
FEMALE	51%	51%	51%	50%	50%	50%	48%
NOT HISPANIC	43%	41%	40%	38%	37%	35%	14%
HISPANIC	8%	9%	11%	12%	14%	15%	34%

Figure 3. 2010 actuals and 2020 to 2060 projected percentage distribution of the population by sex and Hispanic origin for the United States (U.S. Census Bureau, 2012a, 2012b). Note: Population percentages were calculated from the data in Figure 2.

Figures 1 and 3 show that 70% of the change in the U.S. total population, from 2010 to 2060 (projected), was attributable to a change in the Hispanic population. Figure 3 also shows that 36% of the change was attributable to men of Hispanic origin, and 34% was attributable to women of Hispanic origin (U.S. Census Bureau, 2012a, 2012b).

Civilian Labor Force Trends in the United States

U.S. civilian labor force participation might be *best* defined in terms of who was excluded. The U.S. Bureau of Labor Statistics (2014b, 2014c) explained that excluded from the U.S. civilian labor force were persons under 16 years of age, all persons confined to institutions such as nursing homes and prisons, and persons on active duty in the Armed Forces. Additionally, any persons without a job and who are not looking for a job are excluded. Toossi (2012b) explained that the total U.S. civilian labor force would increase by 47 million people or 31%, between 2010 and 2050 (projected). Figure 4 depicts the percentage of civilian labor force change by race and ethnicity, in relation to the total civilian labor force change 2010 to 2050 (projected).



Figure 4. U.S. civilian labor force growth percentages 2010 to 2050 (projected) by race and ethnicity. Adapted from Toossi, M. (2012b). Projections of the labor force to 2050: a visual essay. *Monthly labor review*, 135(10), 3-16.

Figure 4 shows that 80% of the U.S. total civilian labor force growth, from 2010 to 2050 (projected), was attributable to the growth in the Hispanic population. Projections of the civilian labor force growth by sex and Hispanic origin through 2050 were not available; however, the U.S. Bureau of Labor Statistics provided labor force information by age, sex, race, and ethnicity to 2020 (projected) as shown in Figure 5.

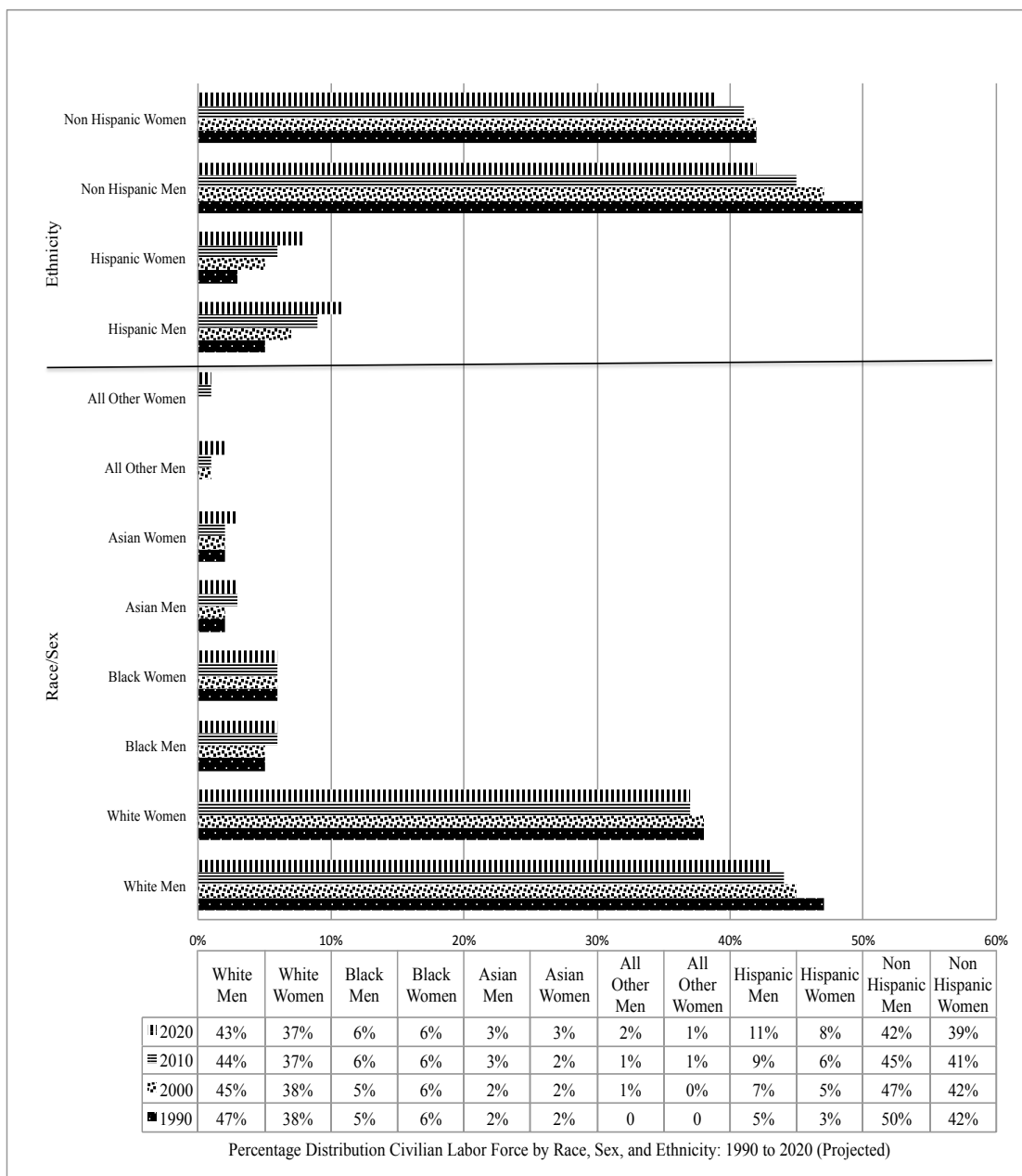


Figure 5. U.S. civilian labor force percentages by race, sex, and ethnicity: 1990, 2000, 2010, and 2020 (projected). Adapted from Toossi, M. (2012a). Labor force projections to 2020: A more slowly growing workforce [Table 4: Civilian labor force by age, sex, race, and ethnicity, 1990, 2000, 2010, and projected 2020]. *Monthly labor review*, 135(1), 43-64.

In 2010, the Hispanic civilian labor force represented 15% of the total U.S. civilian labor force with 9% being men of Hispanic origin and 6% being women of Hispanic origin. In comparison, the 2020 (projected) Hispanic civilian labor force will represent 19% of the total U.S. civilian labor force, with 11% being men of Hispanic origin and 8% being women of Hispanic origin.

Toossi (2012b) and the U.S. Census Bureau (2012b) projected that the Hispanic population will increase at a higher rate than the total population. The projections presented are reflective of expected changes in demographics with, in this case, emphasis being given to increases in the Hispanic populations. The magnitude of the Hispanic population changes in the U.S., from 2010 to 2060 (projected), as compared with U.S. total population changes are important foundational statistics relating to this inquiry.

Hispanic Women Underrepresentation in Management, Professional, and Related Occupations

The higher projected trend rates associated with the Hispanic civilian labor force are consistent with the higher projected trend rates for the overall Hispanic population. However, the Bureau of Labor Statistics (2012a) reported that women of Hispanic origin were significantly underrepresented in management, professional, and related occupations, as a percentage of their respective civilian labor force. Figure 6 provides a comparison of management, professional, and related occupation percentages for 2011.

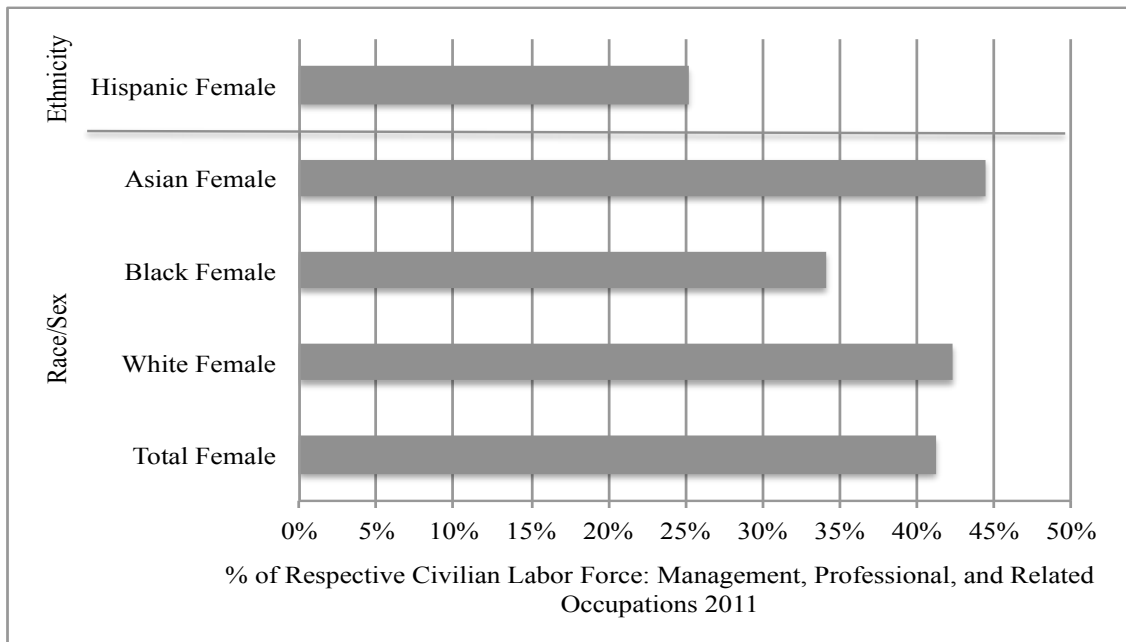


Figure 6. Employed women by race and Hispanic ethnicity: management, professional, and related occupations 2011 (percentage). Adapted from Bureau of Labor Statistics, Labor Force Statistics from the Current Population Survey (2012a). Household data annual averages: 10. Employed persons by occupation, race, Hispanic or Latino ethnicity, and sex (percent distribution).

The Hispanic female participation rate of 25% in management, professional, and related occupations, as a percentage of their respective civilian labor force, was the lowest of the categories presented. Projections beyond 2020 that included occupation were not provided by the U.S. Bureau of Labor Statistics; however, Figure 7 presents a retrospective comparison of management, professional, and related occupation growth rates for 2002 to 2011.

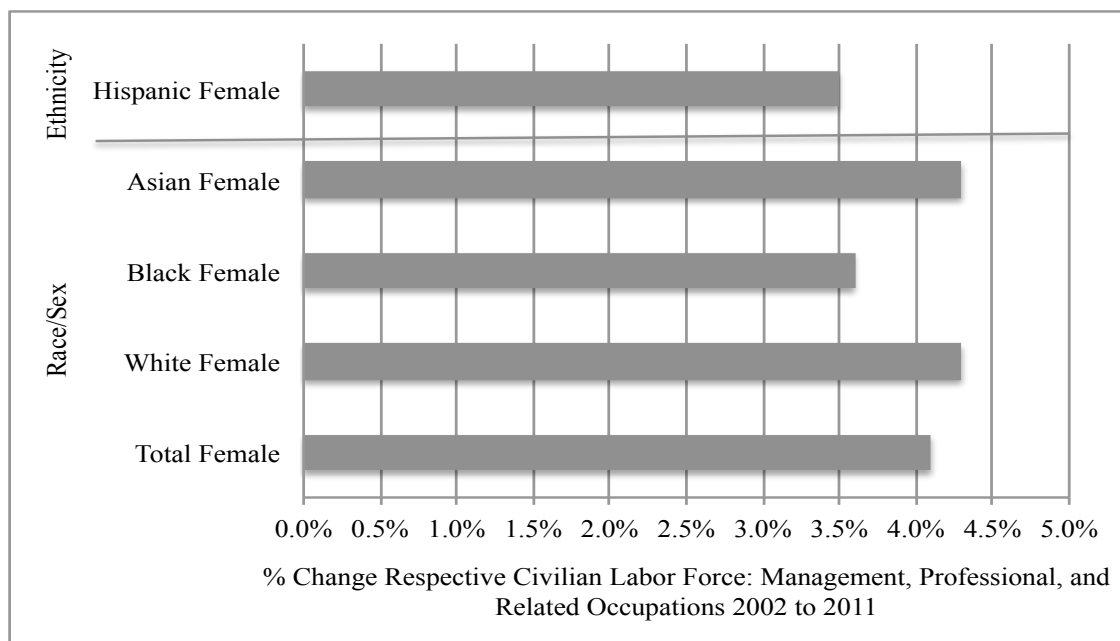


Figure 7. Employed women by race and Hispanic ethnicity: management, professional, and related occupations 2002 to 2011 (percentage change). Adapted from Bureau of Labor Statistics, Labor Force Statistics from the Current Population Survey (2012a, 2012b, 2012c, 2012d, 2012e). Household data annual averages: 10. Employed persons by occupation, race, Hispanic or Latino ethnicity, and sex (percent distribution).

The Hispanic female participation growth rate of 3.5% from 2002 to 2011 in management, professional, and related occupations was the lowest of the categories presented. Toossi (2006, 2012b) and the U.S. Census Bureau (2012a, 2012b) have projected that over the next 4 decades the overall U.S. Hispanic population and the U.S. Hispanic civilian labor force will be increasing. Figure 8 presents these statistics for 2010 actuals and 2020 to 2050 projected (in millions).

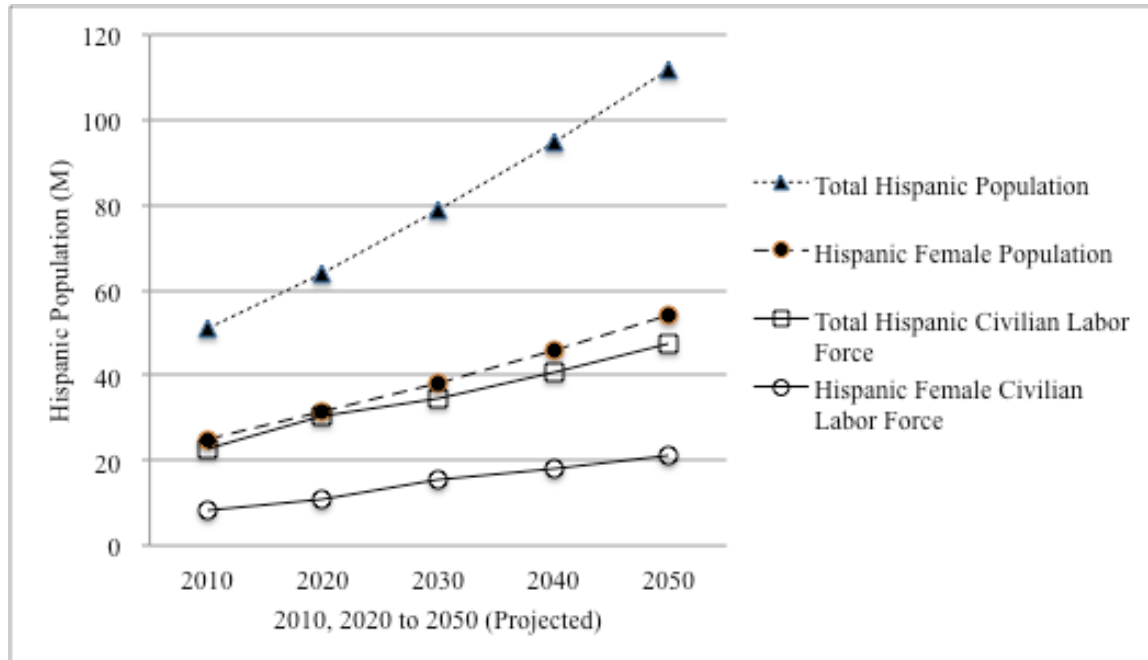


Figure 8. U.S. Hispanic population and civilian labor force levels: 2010, 2020 to 2050 (projected). Sources for Hispanic population data: *Table 3. Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States: April 1, 2010 to July 1, 2011 (NC-EST2011-03)* (U.S. Census Bureau, 2012a) (2010 actual); *Table 4. Projections of the Population by Sex, Race, and Hispanic Origin for the United States: 2015 to 2060 (NP2012-T4)* (U.S. Census Bureau, 2012b) (2020 to 2050 projected); Sources for Hispanic civilian labor force data: Toossi, M. (2006). New look at long-term labor force projections to 2050. *Monthly labor review*, 129(11), 19-39 (2030 to 2050 projected); Toossi, M. (2012a). Labor force projections to 2020: A more slowly growing workforce [Table 4: Civilian labor force by age, sex, race, and ethnicity, 1990, 2000, 2010, and projected 2020]. *Monthly labor review*, 135(1), 43-64.

Figure 8 shows the projected increases in the Hispanic population for each respective population. Figure 9 presents Hispanic female participation rates in management, professional, and related occupations, as a percentage of their respective populations.

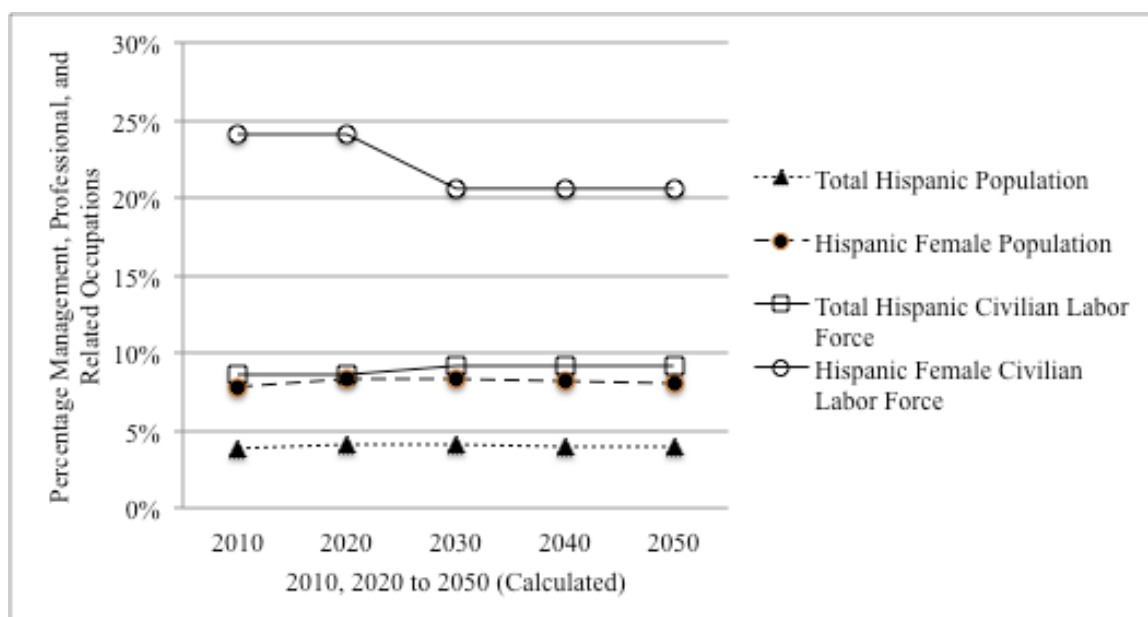


Figure 9. Percentage management, professional, and related occupations for selected U.S. Hispanic demographics: 2010, 2020 to 2050 (calculated). Change in the Hispanic female civilian labor force percentage is due to the difference between reported 2010 actuals and the 2020 projections (Toossi, 2012a) vs. 2030, 2040, and 2050 projections (Toossi, 2006). Sources for Hispanic population data: *Table 3. Annual Estimates of the Resident Population by Sex, Race, and Hispanic Origin for the United States: April 1, 2010 to July 1, 2011 (NC-EST2011-03)* (U.S. Census Bureau, 2012a) (2010 actual); *Table 4. Projections of the Population by Sex, Race, and Hispanic Origin for the United States: 2015 to 2060 (NP2012-T4)* (U.S. Census Bureau, 2012b) (2020 to 2050 projected); Sources for Hispanic civilian labor force data: U.S. Toossi, M. (2006). New look at long-term labor force projections to 2050. *Monthly labor review*, 129(11), 19-39 (2030 to 2050 projected); Toossi, M. (2012a). Labor force projections to 2020: A more slowly growing workforce [Table 4: Civilian labor force by age, sex, race, and ethnicity, 1990, 2000, 2010, and projected 2020]. *Monthly labor review*, 135(1), 43-64.

The percentage of Hispanic women participating in management, professional, and related occupations remains flat over the long-term as shown in Figure 9. Why do Hispanic women have the lowest participation rate ratio based upon race and Hispanic ethnicity, and why is this long-term trend flat? One topic of significant research was occupational segregation, which was defined as the inequality in the distribution or the systematic concentration of groups of people across occupations (Dickerson, Schur,

Kruse, & Blasi, 2010; Gauchat et al., 2012; Mukherjee, 2002; Weeden, 1998; Wilson, 2012). The occupational segregation of Hispanic women might be explained by combinations of gender, race, class (Acker, 2006; England, 2011), culture, ethnicity, geography (García-López, 2008; Yuval-Davis, 2006), structural factors (Kalev, Dobbin, & Kelly, 2006; Kmec, 2005, 2006; Wilson, 2012), or socioeconomic factors (Reskin, 1993, 2000; Wilson, 2012). The European Commission (2009) stated, “there can be no single-factor explanation for it” (p. 38); and as such, the points of intersection and complexity of these interrelationships should be considered.

Problem Statement

The problem, that I studied, was that there is little known about the lived business experiences of Hispanic women executives. For example, Hite (2007) found most of the gender research in managerial and professional positions included White women and excluded those of other racial, ethnic, and cultural backgrounds; and Stone, Johnson, Stone-Romero, and Hartman (2006) noted the paucity of research examining the relations between cultural values and job choice preferences. Hispanic women in the management, professional, and related occupations have the lowest U.S. civilian labor force participation rates, when compared by race and ethnicity. Additionally, the projected long-term trend was that low participation rates will persist through 2050 (Toossi, 2006; U.S. Bureau of Labor Statistics, 2014a; U.S. Census Bureau, 2014).

Occupational segregation research has been a cornerstone of sociological studies of inequality since the enactment of the Civil Rights Act of 1964. One of the goals of the Civil Rights Act of 1964 was to reduce workplace segregation (Tomaskovic-Devey et al.,

2006). Initially, the legislation resulted in significant decreases in occupational segregation, but over time evidenced a steady decline in the rate of workplace desegregation. Since the mid-1980s workplace desegregation has been uneven and there has been no noticeable improvement in occupational gender segregation, by race and ethnicity since 1996 (England, 2010, 2011; Hegewisch, Liepmann, Hayes, & Hartmann, 2010; Reskin & Maroto, 2011). Occupational segregation matters because (a) employers are restricted to a smaller and less motivated pool of qualified candidates, which affects organizational productivity negatively, and (b) provides a measurement of progress associated with wage gap analysis and the economic status of minorities (Hegewisch et al., 2010; Queneau, 2005).

In an exhaustive literature search of 464 sources, I found that research concerning business and professional Hispanic women was spotty. Published studies have explored various research topics while focusing upon Hispanic women and underrepresentation. The causes of workplace inequality have been studied extensively, however less is understood about how to redress it (Kalev et al., 2006; Reskin, 2000). Holvino (2010) cited a lack of recognition of the importance of intersections (i.e., race, class, gender, ethnicity) by organizational studies scholars, organizational change scholars, and practitioners, and called for the narratives of those who have been left out in particular contexts to be articulated. Additionally, Cselenszky's (2012) and Montas-Hunter's (2012) phenomenological studies of women senior leaders in higher education explicitly excluded business executives.

Purpose of the Study

The purpose of this phenomenological study was to explore the lived business experiences of Hispanic women in executive-level positions located in the southeastern region of the United States. Rich and detailed descriptions of each participant's lived experiences and self-perceptions were obtained through semistructured interviews, from which the researcher's interpretations of the meaning and essence of those experiences were connected to the social world around them (Creswell, 2007; Van Manen, 1990).

I used interpretative phenomenological analysis (IPA) methodology (Smith, Flowers, & Larkin, 2009; Smith & Osborn, 2008) in this study. The study fills a gap in the literature by complementing existing work in the field concerning the occupational underrepresentation of Hispanic women. This study adds to the cumulative body of knowledge by increasing people's understanding of Hispanic women executives' self-perceptions of leadership style, the ways they enact leadership, their contributions to organizational effectiveness, and gaining better insight into factors of leadership based upon their lived experiences.

Research Questions

The aim of exploratory research is to deepen people's understanding of the nature, perception, and meaning of everyday experiences (Van Manen, 1990). In keeping with that aim, the overarching research question for this study was: What are the lived business experiences of Hispanic women executives regarding leadership effectiveness? The following research questions provided points of concentration:

- Research Question 1: Which leadership competencies and behaviors, acquired through the lived experiences of being a Hispanic woman business executive, do the group members have in common?
- Research Question 2: What are Hispanic women business executives' perceptions of their leadership style?
- Research Question 3: What are Hispanic women business executives' perceptions of the ways they enact leadership?
- Research Question 4: What are Hispanic women business executives' perceived contributions to organizational effectiveness?

Theoretical Foundation

The theoretical foundation for this study was based upon theories of leadership. Classic leadership theories claimed that Great Men were born with *traits* that set them apart from other men (Carlyle, 1892). Trait theory research continued through the 1940s as it was believed that once the characteristics of leadership (i.e., leadership traits) were identified they could be learned by others (Bass, 1990). After searching for the traits or combinations of traits that defined a leader, researchers turned towards the study of observed *behaviors* (i.e., styles), which focused upon what a leader *does* vs. what a leader *is* (Fiedler & Chemers, 1974). The *situationist* attributed the emergence of a leader solely upon the basis of the situation, where situational conditions determined leadership requirements, and whosoever best matched those requirements emerged as the leader; although, the importance of possessing certain traits remained a factor influencing the potential for becoming a leader (Stogdill, 1974). Eventually, trait theorists and behavior

theorists acquiesced to leader emergence being based upon the personal characteristics (i.e., traits and behaviors) of the person *and* contingent upon the situation. Contingency and noncontingency models provided guidance in matching the appropriate leadership styles with various situations, thus improving leader effectiveness. The theoretical foundation also includes the major theories that constitute *relational* leadership, which are transformational leadership, servant leadership, and followership (Komives, Lucas, & McMahon, 1998).

Conceptual Framework

In this study, I explored Hispanic women business executives' self-perceptions of leadership style, the ways they enact leadership, and their contributions to organizational effectiveness to reveal the meaning and essence of leadership from their perspective(s). Hispanic women business executives are "simultaneously Hispanic, women, and leaders" (Sanchez de Valencia, 2008, p. 11). Gender, race, class, and ethnicity add complexity to lived experience, and this complexity is reflected in the development of leadership related competencies and leadership behavior choices. Gender and ethnicity are considered determinants of effective leadership and were supported through the use of a conceptual lens informed by the concepts of intersectionality (Crenshaw, 1989; hooks, 1984; McCall, 2005), bicultural competence (Brannen & Thomas, 2010; Hong, 2010), and emotional intelligence (Corona, 2010). The theoretical foundation and conceptual framework for this study are pictured in Figure 10, and are explained more thoroughly in Chapter 2.

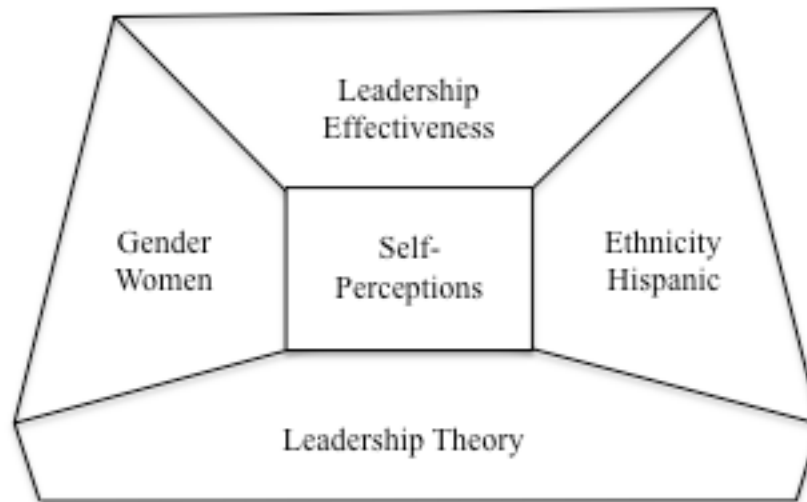


Figure 10. Theoretical foundation and conceptual framework of the study.

Nature of the Study

I used a qualitative phenomenological approach for exploring the lived business experiences and self-perceptions of 12 Hispanic women executives located in the southeastern region of the United States. Creswell (2007), Moustakas (1994), and Van Manen (1990) explained that a phenomenological researcher seeks the meanings of lived experience and reveals its essence through the collection and analysis of rich detailed descriptions provided by the participants. In the most general sense, the essential nature of experience is perception and reflection, although there are differing viewpoints.

Husserl and Gibson (1931) believed the “phenomenological method proceeds entirely through acts of reflection” (p. 215) as a form of a transcendent subjective state of consciousness or pure intuition. Other views of phenomenology considered the reflection of lived experience included the person’s situation within the world and their relationship to the world around them; that phenomena were experienced within a “perceptual field

against the background of the world” (Merleau-Ponty & Landes, 2012, p. 251), or as “being-in-the-world and intraworldliness” (Heidegger, 1982, p. 162). These viewpoints emphasized the “situated and interpretative” nature of people’s understanding about the world and a shift towards a more contextualized phenomenology (Smith et al., 2009, p. 20). This study follows in this latter tradition.

A purposively selected sample (i.e., $N = 12$) participated in face-to-face interviews, which was the primary source of data collection. Data analysis and results preparation were conducted using IPA methodology. IPA was appropriate for use in this study because (a) IPA is idiographic with respect to each participant in its commitment to detail, depth of analysis, and focus on understanding the phenomenon from the perspective of the participant; (b) IPA involves interpretation in the form of a “double hermeneutic” (Smith & Osborn, 2008, p. 53), as the participant tries to understand and describe the experience, the researcher tries to understand and interpret what the participant is describing; and (c) IPA is concerned with examining the subjective experience of “something important” (Smith et al., 2009, p. 1), in this case the participant’s reflective expressions of lived experience and self-perceptions. IPA requires the detailed analysis of each case, followed by the search for patterns between cases.

The face-to-face interviews were audio recorded and then transcribed using Dragon Naturally Speaking software and a personal computer. I used NVivo 10 software to code and analyze the data, as well as prepare results and an audit trail. The data will be kept secure by using password protected files and will be retained for a period of at least 5 years, as required by the university, after which they will be destroyed.

Definitions

Acculturation: A process of change that occurs when individuals or groups having different cultures become exposed to each other effecting a change in the cultural patterns of one or both groups (Redfield, Linton, & Herskovits, 1936). Value conflicts and role conflicts that occur when people are exposed to a second culture will influence the type of acculturation strategy they choose: assimilation, separation/segregation, marginalization, and integration (Berry, 1997; Tadmor & Tetlock, 2006).

Bicultural: Refers to individuals that were born into or acquired more than one cultural schema. The concept and terminology are not limited to only two cultures but can include three or more cultures (Brannen & Thomas, 2010).

Biculturalism: One form of acculturation strategy (i.e., integration) where the individual integrates aspects of the dominant and the nondominant culture(s) (Nguyen & Benet-Martinez, 2013).

Bicultural competence: Cultural knowledge and cross-cultural abilities used to interact effectively with others in cross-cultural contexts by individuals who have been exposed, and have internalized two or more cultures, and operationalize a bidimensional or two-directional dynamic process between the dominant culture and nondominant culture(s) (Benet-Martinez, Leu, Lee, & Morris, 2002; Hong, 2010; Hong, Morris, Chiu, & Benet-Martínez, 2000; Nguyen & Benet-Martinez, 2007, 2013).

Emotional intelligence: The capacity to solve problems through the management of one's own emotions and those of others (Corona, 2010; Mayer & Salovey, 1993; Mayer, Salovey, & Caruso, 2004; Salovey & Mayer, 1990).

Hispanic: The U. S. Census Bureau (2014) categorized Hispanic as Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or of another Hispanic, Latino, or Spanish origin. Additionally, people of Hispanic, Latino, or Spanish origin may be of any race.

Interpretative phenomenological analysis (IPA): A qualitative methodology concerned with exploring the lived experience of people or understanding how people “make sense of their personal and social world” (Smith, 2008, p. 3), and is informed by the philosophies of phenomenology, hermeneutics, and idiography (Shaw, 2010; Smith et al., 2009).

Intersectionality: Refers to a theoretical and methodological approach to inequality. Intersectionality presupposes that categories of structural inequities (i.e., gender, race, class, ethnicity, etc.) intersect and produce complex relationships and emphasizes the “nonadditive effects of multiple forms of oppression” (Choo and Ferree, 2010, p. 132).

Latino(a): Identifies people with origins from countries with languages that have roots in Latin languages (Gonzalez & Gandara, 2005). Latino is interchangeable with Hispanic (i.e., typically masculine), and Latina is interchangeable with Hispanic woman (i.e., feminine).

Leadership: “A process of motivating people to work together collaboratively to accomplish great things” (Vroom & Jago, 2007, p. 18): Furthermore, (a) leadership is a process; (b) influence is achieved through the motivation of others; (c) the nature of incentives are not part of the definition; (d) the result of the influence is a collaboration

towards the achievement of a common goal, and (e) the common goal shared by the leader and followers may not necessarily be considered desirable by all other parties.

Multicultural: Refers to individuals or groups from distinctive cultures, and is often used synonymously with diversity within social contexts (Brannen & Thomas, 2010).

Occupational segregation: Inequality in the distribution of people in the division of labor: Variables of interest include gender, race, ethnicity, national origin, and regional differences (Mukherjee, 2002; Weeden, 1998).

Organization: A combination of authority relations including governance structures, goals, technologies, and client markets (Baum & Rao, 2004).

Organizational effectiveness: Relates to how well an organization can achieve its goals (Chi, Lan, & Dorjgotov, 2012; Lusthaus, Adrien, Anderson, Carden, & Montalvan, 2002; Lusthaus, Anderson, & Adrien, 1997).

Phenomenology: It is both a philosophy and a type of qualitative research that is a “systematic, explicit, self-critical, and intersubjective” study of people’s lived experience (Van Manen, 1990, p. 11): The focus of which is on the experience itself, and how the experience is transformed into consciousness (Merriam, 2009). The search for the core meanings of experience; the assumption being “there is an essence or essences to shared experience” (Patton, 2002, p. 106).

Self-efficacy: “Self-efficacy is concerned not with the number of skills you have, but with what you believe you can do with what you have under a variety of circumstances” (Bandura, 1997, p. 37).

Assumptions

Assumptions are those assertions that are not proven but are presumed to be true.

The following assumptions guided this study:

- Participants will be forthcoming in their interview responses because I assured them of confidentiality.
- Participants will be able to speak and comprehend the English language with little difficulty because the interviews will be in English only.
- Participants should not have a controlling interest in their employing companies in order to avoid self-appointed executive titles or positions.

The truthfulness of the *data* depends upon the participants' abilities and willingness to express their reflective experiences and self-perceptions. The trustworthiness of the *results* depends upon the data, researcher's exercise of due care, and the adequate disclosure of potential bias.

Scope and Delimitations

The research problem indicated the underrepresentation of Hispanic women in the professional, management, and related occupations; especially at the business executive-levels. The study participants were self-identified Hispanic women with, at least, 5 years of executive experience at Fortune 1000, Hispanic Business 500, or other companies—absent a controlling interest. The geographic scope of this study was confined to the southeastern region of the United States, which provided an ample population for purposive sample selection. Additionally, the study was confined to using only Hispanic

women business executives that were able to speak and understand English because the interviews were being conducted in English only.

In the results section, I present the interpretative and descriptive accounts of the lived business experiences and perceptions of Hispanic women executives from their point-of-view. The study was not intended to be a critical analysis of the correctness of their perceptions of leadership styles, the ways they enact leadership, or organizational effectiveness: The purpose was to advance people's understanding and give voice to their perspectives. Hispanic-American history and Hispanic culture were emphasized only to the extent the participants reflected upon them. Intersectionality was given consideration as theory; however, race, gender, and class theories were not considered individually.

The small, homogenous sample used in the study facilitated the depth of analysis and identification of divergent and convergent emergent themes characteristic of IPA research. The oppositional effect is the results will only be applicable to the study group. However, Smith et al. (2009) explained that the "rich, transparent, and contextualized analysis" (p. 51) should enable readers to determine the transferability of the result to similar situations, and although transferability of the individual study results might be limited, it could be improved if the results were reflected upon in combination with other studies.

Limitations

There were also several limitations associated with this study. Creswell (2009) highlighted certain limitations associated with data collection (i.e., face-to-face interviews) such as (a) only indirect information can be obtained from participants as

their descriptions are derived from recollection and reflection, (b) the interview setting is not the natural field, but occurs in a specified place, (c) the abilities of articulating perceptions vary from participant-to-participant, and (d) the possible response bias due to the researcher's presence. In comparison with random selection methods, nonrandom selection methods (i.e., nonprobability sampling) have two basic weaknesses: (a) researcher bias cannot be controlled in the sample selection process, and (b) statistical inference is not possible—the generalizability of the results to a population from the sample is not possible (Singleton & Straits, 2010).

Furthermore, transferability may be affected by the small sample size and the sample being selected from one specific region of the United States out of several possible regions. These factors will need consideration when making similarity judgments (Lincoln & Guba, 1985). Other limitations include (a) the researcher's proficiency in conducting face-to-face interviews, and (b) the researcher's ability to communicate with the participants and interpret their responses with representative faithfulness because the participants were Hispanic women and researcher was a Non-Hispanic male. Reflexivity was used to identify possible bias and reactivity during the research activities and were addressed in the relevant sections of the study.

Significance of the Study

Nieto (2007) argued that Hispanics were on the verge of a leadership crisis, and Catalyst (2011) reported that only 4.9% of women board directors were Hispanic women in 2010. My review of the literature yielded only limited scholarly research specifically

addressing Hispanic women in management, professional, and related occupations, and the challenges they faced (Armijo, 2009).

Significance to Theory

This study is of significance to scholars because I address a gap in the literature regarding Hispanic women business executives and by complementing existing studies concerning the occupational underrepresentation of Hispanic women. Holvino (2010) highlighted the lack of recognition of the importance of the relationships between race, class, gender, and ethnicity, by organizational studies and organizational change scholars. The outcomes of this study address this concern by revealing how the relationships between self-perceptions of leadership, competencies, and behaviors were affected through the lived experiences of being a Hispanic woman.

Significance to Practice

This study is also significant to leader groups including the study participants as leaders, organization leaders, and future leaders. The participants may become more effective leaders through the processes of self-reflection and describing their lived experiences, thereby obtaining a deeper understanding of their competencies, behaviors, and organizational outcomes. Organization leaders need to recognize the negative effects of occupational segregation on organizational effectiveness and seek better understanding of Hispanic women business executives' competencies and perspectives. Organization leaders interested in creating more inclusive and attractive environments for Hispanic women should recognize these attributes in a favorable light and provide leadership opportunities for Hispanic women to further organizational goals. The findings should

also provide young Hispanic women with an impression of what being a business executive might be like and what this type of career path might hold for them as future business leaders.

Significance to Social Change

The significance of the study for positive social change is based upon the premise “social life is comprised of people who exist through space and time” (Poole, 2004, p. 17), in which people play a key role in organizational change and innovation. The people, in this case, are Hispanic women business executives; the space is the workplace (i.e., southeastern region of the U.S.) and the global business environment; and time (i.e., an interval measure of an action, a condition, or a state of being) is oriented towards the future. The U.S. Census Bureau (2012b) projected that the Hispanic population will increase dramatically through 2060, and so should the number of Hispanic women available and willing to assume business leadership roles. Increasing their numbers will require policy and behavior changes, in the supply-side and the demand-side, of the occupational segregation equation. Through the conduct of this study I gave a voice to a sample of Hispanic women business executives whose experiences and self-perceptions might (a) increase awareness of the underrepresentation of Hispanic women in the management, professional, and related occupations; (b) promote the inclusion of Hispanic women executives’ perspectives in an educational curriculum; (c) encourage the development of organizational diversity training programs in support of Hispanic women business leaders; (d) incentivize the implementation of organization-wide cultural change initiatives that invite, use, and retain Hispanic women business leaders; and (e) encourage

additional studies of Hispanic women and other underrepresented groups and the use of other research approaches.

Summary and Transition

Chapter 1 included the problem statement and background of the problem: There is little known about the lived business experiences of Hispanic women executives. A scarcity of research was identified in the field concerning the occupational underrepresentation of Hispanic women in management, professional and related occupations. The principal goal of this study was to fill a gap in the literature by exploring the lived business experiences of 12 Hispanic women executives and revealing their self-perceptions of leadership style, the ways they enact leadership, their contributions to organizational effectiveness, and gain better insight into factors of leadership based upon their lived experiences.

Chapter 2 includes the theoretical foundation, the conceptual framework, and research approach selected for the study. Classic and contemporary theories of leadership form the foundation while a conceptual lens informed by the concepts of intersectionality, bicultural competence, and emotional intelligence also support the purpose of the study. Previous research is presented that demonstrates the relationships between intersectionality, bicultural competence, emotional intelligence, and leader effectiveness.

Chapter 3 includes the rationale for selecting a qualitative research design; my role as the researcher and potential influence on the study; the purpose and procedures of the pilot study; the linkage between interview questions and research questions; the

methods used for sample selection and recruitment; data collection and analysis; and issues of trustworthiness.

Chapter 2: Literature Review

Hispanic women in the management, professional, and related occupations have the lowest U.S. civilian labor force participation rates when compared by race and ethnicity, additionally the projected long-term trend is that low participation rates will persist through 2050 (Toossi, 2006; U.S. Bureau of Labor Statistics, 2014a; U.S. Census Bureau, 2014). Since the mid-1980s workplace desegregation has been uneven (England, 2010, 2011; Reskin & Maroto, 2011). Researchers who demonstrated this unevenness included Tomaskovic-Devey et al. (2006) who showed between 1966 and 1980 sex and race/ethnic employment segregation declined noticeably in the U.S., however between 1980 and 2003 only sex segregation declined. Queneau (2005, 2009) found that employment segregation by race (i.e., between Blacks and Non-Blacks) declined moderately between 1983 and 2002 however ethnic segregation (i.e., between Hispanics and Non-Hispanics) increased significantly over that period. Occupational segregation matters because (a) employers are restricted to a smaller and less motivated pool of qualified candidates, which affects organizational productivity negatively, and (b) provides a measurement of progress associated with wage gap analysis and the economic status of minorities (Hegewisch et al., 2010; Queneau, 2005).

There is little known about the lived business experiences of Hispanic women executives. For example, Hite (2007) found that most of the gender research in managerial and professional positions included White women and excluded those of other racial, ethnic, and cultural backgrounds; and Stone et al. (2006) noted the paucity of research examining the relations between cultural values and job choice preferences. My

literature search of 464 sources revealed that research concerning business and professional Hispanic women was spotty. Published studies have explored various research topics while focusing upon Hispanic women and underrepresentation; oftentimes Hispanic businesswomen were excluded from the sample. Phenomenological studies of women senior leaders in higher education conducted by Cselenszky (2012) and Montas-Hunter (2012) explicitly excluded business executives.

I began this study with the collection of data from the participants and the identification of qualitative attributes the participants had in common (i.e., competencies) as viewed through the conceptual lenses of intersectionality, bicultural competence, and emotional intelligence; secondly, I explored the influence of these competencies on participants' perceptions of leadership style and the ways they enact leadership (i.e., behaviors); and thirdly, their perceived contributions to organizational effectiveness were revealed (i.e., group performance outcomes). Figure 11 presents the layout of the study.

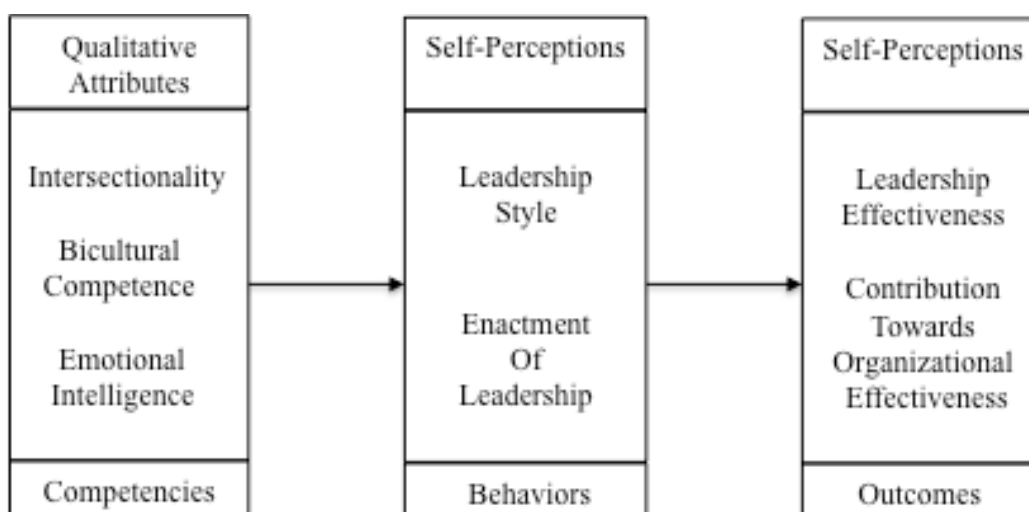


Figure 11. Layout of the study: qualitative competencies, self-perceived behaviors, and self-perceived outcomes.

Chapter 2 contains analyses of theories and empirical research concerning certain aspects of Hispanic women business executives' lived experiences and concepts that inform understanding of the phenomena under study. The first section contains the theoretical foundations of leadership upon which the study was based. In the second section, I review the concepts used to form the conceptual lens guiding the perspectives of the study. In the third section, I present related key concepts that provide additional context for the conceptual framework. In the fourth section, I discuss prior research and its relationship to the study. The final section includes an analysis and justification for the qualitative research design.

Literature Search Strategy

In the literature review, I included current studies and seminal sources consisting of peer-reviewed journal articles, scholarly books, government publications, private reports, doctoral dissertations, and previously unpublished personal research. The literature search included the following databases and libraries: ABI/INFORM Complete, Academic Search Complete, Business Source Complete, Elsevier, Emerald Database, JSTOR, MEDLINE, Political Science Complete, ProQuest Dissertations & Theses (PQDT), ProQuest Dissertations & Theses @ Walden, PsycArticles, PsychINFO, SAGE Encyclopedia, SAGE Journals, ScienceDirect, SocINDEX with Full Text, Miami-Dade Public Library, University of Miami Libraries, Walden University Document Delivery Service (DDS), Wiley Online Library.

My literature search included a review of 464 sources with 171 being cited in this study. The distribution of cited sources is shown in Table 1.

Table 1

Literature Review Sources

Sources	2014 - 2008	2007 - 2002	2001 - 1892	Total
Peer-reviewed journal articles	35	31	14	80
Scholarly books	19	12	35	66
Government publications	15	1	1	17
Private reports	2	0	0	2
Doctoral dissertations	6	0	0	6
Total	77	44	50	171

The following search terms (i.e., keywords) were used in the literature search: *women in management; Hispanic; Catalyst and Hispanic (2002-2012); Hispanic and female (2006-2012); Hispanic and workplace (2006-2012); Hispanic and women and workplace; Hispanic and leadership; Hispanic and segregation (2002-2012); Hispanic Journal of Hispanic Research and executive; intersectionality (2006-2012); Latina and phenomenological (2002-2012); Latina and professional; Latina and success (last 5 years); Latina and leadership (2004-2012); Latina executive (2001-2012); leadership and emotional intelligence; leadership and enactment; leadership and multicultural; leadership and style; leadership effectiveness; leadership and styles and bicultural competence; multiracial and feminism (2000-2012); multiracial feminism; occupational segregation (1975-2012); occupational segregation and Hispanic; organization and effectiveness and female; organization and emotional intelligence and effectiveness; organization theory and effectiveness; organizational effectiveness; organizational and effectiveness and business and Hispanic; organizational and effectiveness and measures; organizational effectiveness and bicultural; organizational effectiveness and female and*

Hispanic; racializing and practices; South Florida and culture; workplace segregation (2002-2012).

Theoretical Foundation

The 20th century experienced industrial change and social change. Advancements in education and the social sciences improved people's understanding of the relationships between leaders and followers. The depth and breadth of the leadership field necessarily require the discussion to be limited in scope. The following review includes a selection of classic and contemporary leadership theories. Also included are models for evaluating leadership effectiveness and selecting appropriate leadership styles.

Great Man Theory

Carlyle (1892) pondered the origin of those of which he would term *Great Men*. Who were those that shaped the world since early times? Those men born different from other men, from where did they come? Those men who made sense of the world for those who could not make sense themselves; giving direction to those who were lost; hope to the hopeless; light to those in the dark, who were these men? What makes a Great Man? Do we even know how to describe him? Does he even know himself? We know that Great Men were born; believed to be a gift from heaven. It was through these Great Men the history of man was made; they were the creators; whatsoever the world was and has become was at the behest of these noble beings—*heroes* if you will. “Could we see *them* well, we should get some glimpse into the very marrow of the world's history” (Carlyle, 1892, p. 236). “That man, in some sense or another, worships Heroes; that we all of us reverence and must ever reverence Great Men” (p. 249).

Odin was worshipped as a god; his *sincerity* was pure and of the highest honor, but yet we ask what makes a Great Man? Carlyle (1892) said, “Sincerity, I think, is better than grace” (p. 263). “I should say *sincerity*, a deep, great, genuine sincerity, is the first characteristic of all men in any way heroic” (p. 276). A great man does not need to boast of sincerity for he embodies it: It is not sincerity that he is aware of, but of *insincerity*. As much as all men may have the capacity for sincerity, the “Great Man cannot be without it” (p. 277). He was sent from the unknown to lighten the rest of human kind: He was in the form of original man. What are the titles that have been ascribed to those Great Men: Hero, Poet, King, Priest, or Prophet? A Great Man is capable of being any of these.

Dante's Divine Comedy was described as the “*sincerest* of all poems” (Carlyle, 1892, p. 321), spanning the expanse of time from generation to generation. Dante opened his heart and bore it for all who read his words to see. The source of Dante’s sincerity was to be found deep within his heart. Here was where Carlyle found sincerity “to be the measure of worth” (p. 321).

What was to be said of Shakespeare's *intellect*? Intellect, imagination, understanding, and morality, are they not but “different figures of the same Power of Insight?” (Carlyle, 1892, p. 333). These intellectual faculties were not separable in men; they originated from within men and were emanated from a common underlying force. What then, should be the name of this force within men? “For, in fact, I say the degree of *vision* that dwells in a man is a correct measure of the man” (p. 333).

How should we speak of *valor*? Is valor bravery, heroism, gallantry, stoutness of heart, chivalry, tenacity, fortitude, courage, or any number of descriptors that would raise

some men above the rest? These descriptors all bear something in common; they bear the mark of conflict: spiritual conflict, physical conflict, or conflict of mind. Through the course of time there have been many struggles marked by the valor of those Great Men through the ages, and as the ages changed so changed the face of valor, as Carlyle (1892) described “Odinism was Valor; Christianity was Humility, a nobler kind of valor” (p. 345). Both ideals conveyed the essence of battle being waged and hidden behind the cloak of valor was found the *strength* of Great Men, whether it was inner strength, outer strength, or both. It was the strength of those who battled that made the difference: “I say sometimes, that all goes by wager-of-battle in this world; that *strength*, well understood, is the measure of all worth” (p. 368).

How should we speak of those who have written through the ages; not those who wrote of common things, but those whose writings were of the highest purpose, genuine, and honorable? Perhaps he was a philosopher who made sense of the world, and of what was not seen beyond the superficial daily lives of the many? These *Men of Letters* wrote in terms of truth, divinity, and the eternal:

He is uttering forth, in such way as he has, the *inspired* soul of him; all that a man, in any case, can do. I say *inspired*; for what we call ‘originality,’ ‘sincerity,’ ‘genius,’ the heroic quality we have no good name for, signifies that. (Carlyle, 1892, p. 379)

Every generation has manifested Men of Letters whose purpose was to enlighten others through their divine inspiration.

Carlyle, himself, could justly be regarded a man of letters, albeit he would not boast of himself? His deepness of thought and eloquence of writing cannot be portrayed justly by my unworthy representation of his meanings. Through this dialogue we must ask the question, “Have we found what makes a Great Man?” We know that a great man can be many things: Hero-god, Poet, Priest, King, or Prophet. We know that a great man possesses valor, strength, vision, and inspiration. The characters of these Great Men were of the highest caliber; of the caliber that beckoned others to follow from the darkness into lightness. These men were born of their character, as their character was born in them, as they were born as Great Men. So we find as Carlyle (1892) found, “The grand fundamental character is that of Great Man; that the man being great” (p. 308). Therefore, since the very few are lucky to be born great, are there characteristics that could be learned that might help the rest of us become a little bit more like them?

Trait Theory

Distinguishing features or *traits* were believed to separate great men from common men. What determines which traits are more important than other traits? Carlyle (1892) described sincerity, valor, strength, and inspired as possible characteristics of great men. Weber (1968) identified *charisma* as a characteristic that distinguished a leader from other men. Men who had been endowed with charisma received this gift from the divine, the supernatural, a capability not available to other men (i.e., natural leaders); and those men who possessed such divine grace did not stand in front of their followers with humility and gratitude for their support; on the contrary, the charismatic man expected obedience and loyalty from his followers:

Charisma knows only inner determination and inner restraint. The holder of charisma seizes the task that is adequate for him and demands obedience and a following by virtue of his mission...His charismatic claim breaks down if his mission is not recognized by those to whom he feels he has been sent. If they recognize him, he is their master...But he does not derive his 'right' from their will, in the manner of an election. Rather, the reverse holds: it is the duty of those to whom he addresses his mission to recognize him as their charismatically qualified leader. (Weber, 1968, p. 20)

Additionally, it must be considered that *culture* influenced the perceptions of leadership and which personal traits constituted a leader. Frankfort, Frankfort, Wilson, and Jacobsen (1949) explained that the Egyptians required their leaders to exemplify *authority, discrimination, and just behavior*. In the eyes of Egyptians their king was God and the embodiment of divinity: "Authoritative utterance is in thy mouth, perception is in thy heart, and thy tongue is the shrine of justice" (p. 95). Stogdill (1974) also explained that leadership traits varied from culture to culture citing Greek concepts of leadership: "(1) *justice and judgment*—Agamemnon; (2) *wisdom and council*—Nestor; (3) *shrewdness and cunning*—Odysseus; (4) *valor and action*—Achilles" (p. 82). Regardless of the culture, time period, or history the common belief was that leaders were born, and the qualities setting them apart from other men were of divine nature, present at birth, and were not learned; albeit life experiences and situational conditions could facilitate the *emergence* of a leader.

Researchers who attempted to identify leadership traits proliferated during the early and middle parts of the 1900s, as scholarly interest in the physical and the personal characteristics of leadership increased. Most research until the 1940s attempted to identify leadership qualities. According to Bass (1990), there were two questions that needed to be answered; “What traits distinguished leaders from other people? What is the extent of those differences?” (p. 38). It seemed logical that if the characteristics of leadership could be identified, then it would be possible to teach people to become leaders.

Bass (1990) cited two surveys of the literature performed by Stogdill. The first survey covered the literature up through 1947; the follow-up survey covered 1948 through 1970 and included a comparative analysis. It is interesting to note, even though trait theory had given way to the belief that the *characteristics of the individual and demands of the situation* permitted the rise of an individual to leadership status; it was still believed that individuals *possessing certain traits* had more potential for becoming a leader than individuals without those traits. Table 2 displays identifiable physical traits and personality characteristics of leaders from three distinctly different sources. The similarities are compelling and suggest that traits *are* a significant aspect of leadership.

Table 2

*Trait Theory - A Comparison of Identifiable Physical Traits and Personality**Characteristics of Leaders*

John Gardner (1990)	USMC 14 Leadership Traits	Stogdill's 1970 Survey vs. 1948 Survey Results (partial listing)
Physical vitality and stamina	Enthusiasm	Activity, energy
Intelligence and action-oriented judgment	Judgment	Intelligence
Trustworthiness	Dependability	Personal integrity, ethical conduct
Task competence	Knowledge	Knowledge, education
Decisiveness	Decisiveness	Judgment, decisiveness
Skill in dealing with people	Tact	Sociability, interpersonal skills
Need for achievement	Initiative	Drive to achieve, desire to excel
Capacity to motivate people	Justice	Administrative ability, cooperativeness
Courage and resolution	Courage	Strength of conviction
Eagerness to accept responsibility	Integrity	Drive for responsibility
Understanding of followers and their needs	Bearing	Emotional balance, control
Self-confidence	Unselfishness	Self-confidence
Assertiveness	Loyalty	Ascendance, dominance
Adaptability/flexibility	Endurance	Adaptability, normality

Note. Sources: "On leadership," by John Gardner, 1990, New York: Free Press. Copyright 1990 by the Free Press; "Marine Corps Values: A User's Guide for Discussion Leaders," by United States, 1997, Washington, DC: U.S. Marine Corps. <http://www.marines.mil>; "Bass & Stogdill's handbook of leadership: theory, research, and managerial applications (3rd ed.)," by B. M. Bass, 1990, New York, NY: Free Press. Copyright 1990 by the Free Press.

Trait theory was based upon what a person *is* while behavior theory was based upon what a person *does*. After searching many years for the trait—or a combination of traits—that defined a leader, “researchers turned toward the study of leader behavior” (Fiedler & Chemers, 1974).

Behavior Theory

Fiedler and Chemers (1974) considered if no single trait could determine leadership effectiveness then could there be a set of traits or *styles* that were characteristic of effective leaders? From this perspective leadership styles seemed to be equivalents of leadership traits, but styles differed from traits in that leadership styles were defined by leader behaviors: Leadership styles primarily focused “on what the leader *does* rather than what he is” (p. 40).

Observational studies have identified a number of behaviors not anticipated by the trait theories. Whereas the trait theorists were interested in the subjective aspects of personality dynamics, the group experimenters were concerned with observable behaviors. Perhaps it is not surprising that the two approaches produced somewhat different results. (Stogdill, 1974, p. 220)

Every leadership act rests upon assumptions made regarding human behavior and motivation. As McGregor (1960) explained, the solutions to leadership challenges were based on behavioral theories and the individual’s expectations that if we do *a* then *b* will occur. A theory explains why things happen as they do, and if our actions were based upon a theory, then as McGregor pointed out “theory and practice are inseparable” (p. 6).

McGregor's (1960) classic *Theory X* described the assumptions underlying scientific management and related literature. “Theory X is built on the least common human denominator: the factory ‘hand’ of the past...” (p. 43). It portrayed working people as those who: needed direction, avoided responsibility, performed as little as possible, needed to be monitored, were punished and rewarded, etc.. Employees were assumed to be motivated by incentives that benefited them only *after* they left the job at the end of the day. Fringe benefits (i.e., overtime pay, vacation, health benefits, long-term compensation, etc.) and wages were the compensations paid for the workers efforts; which again, benefited the worker after leaving the job for the day. From the employee's perspective “work is perceived as a form of punishment” (p. 40); then logically, why should the worker experience more punishment than was necessary? These assumptions regarding worker’s motivations determined the manner of interaction between leaders and followers; therefore, the behaviors of leaders determined the behavior of followers.

McGregor's (1960) counterpart to Theory X was known as *Theory Y* and embraced assumptions of motivation based upon the nature of relationships as human nature. These new assumptions formed the basis of Theory Y:

- *The expenditure of physical and mental effort in work is as natural as play or rest.* The average human being does not inherently dislike work. Depending upon controllable conditions, work may be a source of satisfaction (and will be voluntarily performed) a source of punishment (and will be avoided if possible).

- *External control and the threat of punishment are not the only means for bringing about effort toward organizational objectives. Man will exercise self-direction and self-control in the science of objectives to which he has committed.*
- *Commitment to objectives is a function of the rewards associated with their achievement.* The most significant of such rewards, e.g., the satisfaction of ego and self-actualization needs, can be direct products of effort directed toward organizational objectives.
- *The average human being learns, under proper conditions, not only to accept but to seek responsibility.* Avoidance of responsibility, lack of ambition, and emphasis on security are generally consequences of experience, not inherent human characteristics.
- *The capacity to exercise a relatively high degree of imagination, ingenuity, and creativity in the solution of organizational problems is widely, not narrowly, distributed in the population.*
- *Under the conditions of modern industrial life, the intellectual potentialities of the average human being are only partially utilized.* (McGregor, 1960, pp. 47-48, emphasis in original)

Theory Y assumptions sharply contrasted with Theory X assumptions. Theory Y regarded people as having potential for learning and development, self-direction, commitment, collaboration, and most importantly the opportunity for leaders to explore new ways of behavior that motivated people to work for the betterment of themselves and

the enterprise. These responsibilities were placed squarely upon leaders who would require new thinking and flexibility. Theory Y assumptions “stressed the necessity for selective adaptation rather than for a single absolute form of control” (McGregor, 1960, p. 48). Additionally, if the assumptions of Theory Y were not followed, then it was assumed that the enterprise would suffer. Theory Y espoused that authority (Theory X) was “not appropriate for all purposes and under all circumstances” (McGregor, 1960, p. 56); however, McGregor believed authority (Theory X) was appropriate under certain circumstances, particularly when the application of Theory Y, or worker participation, could not be achieved.

Behavior theory seemed to fit well within the human relations movement but lacked predictive value and faced shortcomings similar to those that plagued pure trait theory. Behavior theory needed something else, and by incorporating the analysis and comparison of Stogdill’s 1948 and 1970 trait surveys, it was proposed that the emergence of leaders could be explained only by *both the person and the situation* (Bass, 1990).

Leadership Style

Fiedler and Chemers (1974) defined *style* as the “relatively enduring set of behaviors which are characteristic of the individual regardless of the situation” (p. 40). This interpretation of an enduring set of behaviors resembled an interpretation of traits; however, the focus of style was on behavior and there was a clear distinction between what a leader *does* (i.e., behaviors) vs. what a leader *is* (i.e., traits). Now people were faced with a paradox because leaders’ behaviors were not always consistent: Leaders might be considerate in some situations and inconsiderate in other situations. This

inconsistency meant that for any given leader “we cannot define leadership style by leader behavior” (p. 102); although leader behavior could be guided by enacting a defined leadership style—one that was appropriately matched for the situation.

Blake and Mouton (1978) believed there existed a *one-best-way* to lead based upon the basic principles of human relationships and deviating from that one-best-way would produce a less effective result; just as deviating from the basic principles of physics or biology would produce a less than desired result in their respective areas of scientific inquiry. The key to the application of the one-best-way while upholding human relationship principles was *versatility*. Versatility in the application of the one-best-way met the needs of unique situations without violating its principles.

If the effectiveness of leadership behavior (i.e., style) were dependent upon the situation, then any particular leadership style might be effective or ineffective dependent upon the situation (Hersey & Blanchard, 1988). Likewise, if the effectiveness in the application of Blake and Mouton’s one-best-way were dependent upon the situation, then any particular application of the one-best-way might be effective or ineffective dependent upon the situation. The appropriateness of the use of a style in any given situation, or the application of the one-best-way in any given situation, determined its effectiveness or ineffectiveness “as seen by the leader’s followers, superiors, or associates” (p. 116). These and other approaches to enacting leadership are discussed in the following sections.

Situational/Contingency and Noncontingency Models

The *situationist* point of view, as Stogdill (1974) explained, attributed the emergence of leaders solely upon the basis of the situation. Situational conditions determined leadership requirements and whosoever best matched those requirements would emerge as a leader: Personality traits were ignored. However, in 1948, 124 trait studies were performed, and in 1970, 163 studies of leadership characteristics were performed. Stogdill's comparison of these two studies showed that any single trait or leadership characteristic had little influence or predictive value in determining who would emerge as a leader. However, his comparison also showed that combinations of traits or characteristics could provide an advantage to one individual over another in leader selection. "The conclusion that personality is a factor in leadership differentiation does not represent a return to trait approach. It does represent a sensible modification to the extreme situationist point of view" (Stogdill, 1974, p. 82). Even though trait theory or behavior theory alone provided limited predictive power, when combined with situational factors predictive power was increased; therefore leader emergence was considered to be contingent upon personal characteristics (i.e., traits or behaviors) *and* upon the situation.

A Contingency Model of Leadership was one based upon (a) the motivational system of the leader, and (b) the situational favorableness (Fiedler & Chemers, 1974). The motivational system of the leader was based upon two diametric behavioral concepts defined in certain Ohio State University and the University of Michigan studies, and were widely accepted. Fiedler and Chemers (1974) explained that the motivational system of the leader could be described as a *high or low* measurement of the level of *consideration*

that the leader showed towards others (i.e., the level of interest in the well-being of subordinates, showing sympathy, understanding their needs, and the willingness to explain oneself and promote participation), versus *initiating structure* (i.e., defining goals, assigning tasks, designing work schedules, and directing activities). This motivational, behavioral framework was also referred to as relationship-motivated vs. task-motivated, or employee-centered vs. production-centered. These different terminologies were based upon the same underlying assumptions about attitudes towards relationship-based interactions vs. task-based interactions with others. The two descriptors (i.e., relationship vs. task) were independent of each other, and a leader could be measured as *high or low* in both descriptors simultaneously. In other words, a person could be measured as to their level of *consideration* and *initiating structure* as being:

- Low consideration - low initiating structure.
- High consideration - low initiating structure.
- High consideration - high initiating structure.
- Low consideration - high initiating structure.

These four pairs of descriptors provide the basis for the next three models under discussion.

The first model for discussion is Fiedler and Chemers's (1974) Contingency Model of Leadership Effectiveness. This model used the situation as its foundation (i.e., *situation favorableness*), which had a contingency component based upon the motivational, behavioral framework of the leader. Three important factors defined the situation in this model. The first factor was the measure of acceptance of the leader by the

other group members. This measure might be obtained by conducting a sociometric preference survey of the group members or an alternative method, the group atmosphere (GA) score that reflected the leader's perception of his group's acceptance:

In most cases, the group atmosphere score seems to provide a very quick and valid measure of the leader's feeling of being accepted which may, of course, affect his behavior much more than the degree of actual acceptance by his group. (Fiedler & Chemers, 1974, p. 66)

The second factor was the task-structure dimension of the situation. This dimension related to how much direct control the leader must apply to accomplishing tasks. A structured task environment implied that the leader must exert a great deal of control over task accomplishment while "an unstructured task implies correspondingly lower control and influence" (p. 66). The third factor important to the situation was position power. Position power was the amount of legitimate authority vested in the leader granting them authority to direct activities, provide reward and punishment, etc., for those for which they were responsible. In summary, the three factors that were most important for the leader's influence in a situation (i.e., *situation favorableness*) were (a) whether the leader's group atmosphere (GA) or sociometric preference score was high or low, (b) whether the task was structured or unstructured, and (c) whether position power was high or low. These factors determined whether the leader's situation favorableness measure was unfavorable, intermediately or moderately favorable or favorable. Once the situation favorableness was determined, the leader's motivational system (i.e., *the contingency*) was incorporated.

The key variable in Fiedler and Chemers's (1974) contingency theory was called the Least Preferred Coworker score (LPC). "It is obtained by asking the individual to think of everybody with whom he has ever worked and to describe the person with whom they could work least well, his 'least preferred coworker'" (p. 73). A person with a positive or high LPC score would describe their least preferred coworker *more positively* in attributes, not directly related to their work; signifying a higher level of concern or consideration for others. A lower LPC score described the least preferred coworker in *very negative* terms; indicating an unwillingness or complete rejection of those whom they could not work. Accordingly, high LPC scoring people were labeled relationship-oriented while low LPC scoring people were labeled task-oriented.

The results of validation studies demonstrated that leaders with low LPC scores were effective in very unfavorable and very favorable situations while high LPC scoring leaders were effective in intermediately or moderately favorable situations. It was found that if a situation was *unstructured* and the leader was *disliked* (i.e., low situation favorableness), then a task-oriented (i.e., low LPC score) leader would be effective; or if the situation was very *structured* and the leader was *liked* (i.e., high situation favorableness), then again a task-oriented (i.e., low LPC score) leader was determined to be effective. Conversely, it was found that the high LPC scoring leaders were more effective in the intermediately or moderately favorable ranges. If a leader was *liked* but the task was *unstructured*, then he/she might rely on the members of the group to be self-motivated, participating, and inventive to accomplish the task; if the leader was *disliked* but the task was *structured*, then he/she might show more concern for their needs, be

more diplomatic, or be more persuasive to motivate the group to accomplish the task. These results indicated that there was *no one-best-way to lead*. In some situations, the task-oriented leader would be more effective, and in other situations the relationship-oriented leader would be more effective. The important aspect of this theory was “the theory allows us to predict” (Fiedler & Chemers, 1974, p. 91) what characteristics defined the situation; in other words, it allowed us to accurately predict the *type* of situational environment requiring leadership. Fiedler and Chemers (1974) explained how this theory was distinguished from other theories:

The Contingency Model *predicts* on the basis of an LPC score which can be obtained *prior* to assembling the groups. The other theories merely show that there is an association between behavior and performance. This implies that the combination of LPC and situational favorableness determines behavior and performance, while most other theories have only shown that there is an association between leader behavior and performance. (p. 103)

The stated predictive value in the Fiedler and Chemers model was the ability to match beforehand the appropriate leader with the predicted situation, and was also a strong declaration in favor of their theory. However, there were other models that had predictive value.

Blake and Mouton’s (1978) Managerial Grid was a noncontingency model that could be used to better understand one's own managerial/leadership style, and also help a person to view themselves and others more objectively. But more importantly it could be used “to see how to change themselves, and to help others toward more productive and

rewarding experiences” (p. 6). The managerial grid’s motivational framework included *concern for production* and *concern for people*. There were three aspects of the grid defined as (a) amount of output or *concern for production*; (b) the human interest in coworkers, colleagues, and subordinates as individuals, or *concern for people*; and (c) the *concern for how the grid hierarchy* would be used to facilitate and provide guidance to maximize production with and through people. “*Concern for* is not a specific term which indicates the amount of actual production or actual behavior toward people. Rather, it indicates the character and strength of assumptions present behind any given managerial style” (p. 9). The grid provided an understanding of the assumptions people make as they “compete or cooperate with one another” (p. 15). Concern for people and concern for production are presented on a scale from one to nine respectively. The managerial grid had four quadrants with an additional area in the center of the grid. The five grid assumptions are shown in Table 3.

Table 3

Managerial Grid Construction

Style Axis Y , X	Assumptions (Y axis concern for people) (X axis concern for production)
9 , 1	In the lower right-hand corner of the Grid, a maximum concern (9) for production is combined with a minimum concern (1) for people. A manager acting under in these assumptions concentrates on maximizing production by exercising power and authority and achieving control over people through compliance. This is a 9 , 1 orientation.
1 , 9	The 1 , 9 leadership style is in the top left corner. Here, a minimum concern (1) for production is coupled with maximum concern (9) for people. Primary attention is placed on promoting good feelings among colleagues and subordinates.
1 , 1	A minimum concern for both production and people is represented by 1 , 1 in the lower left corner. The 1 , 1 oriented manager does only the minimum required to remain within the organization.
5 , 5	5 , 5 is in the center. This is the “middle of the road” theory or the “go-along-to-get-along” assumptions that are revealed in conformity to the status quo.
9 , 9	Production and people concerns are integrated at a high level in the upper right-hand corner representing the 9 , 9 style of managing. This is a team approach. It is goal-oriented and seeks to gain results of high-quantity and quality through participation, involvement, commitment, and conflict solving.

Note. Adapted from “*The New Managerial Grid*,” by R. Blake and J. Mouton, 1978, p. 12, Houston, TX: Gulf Publishing Company. Copyright 1978 by the Gulf Publishing Company.

According to Blake and Mouton (1978), there *is one-best-way to lead*. The managerial grid was a tool used to compare differing assumptions with the 9,9 assumption. It allowed a person to see similarities and differences between their style and a 9,9 style. Perhaps the grid would guide them to the conclusion that being a 9,9 leader would be more effective than haphazardly changing their behavior based upon feelings or recommendations according to the situation. Blake and Mouton (1978) were critical of situational/contingency theories that explained that the key to success was *flexibility*—the ability to substitute one style of leadership for another according to the situation; arguing that the key to effective leadership was not flexibility, but *versatility*. Blake and Mouton (1978) proposed that there were principles guiding the physical sciences, that there were principles guiding the natural sciences, and there were principles guiding the biological sciences; then logically there must be rules (i.e., principles) underlying and guiding the behavioral sciences. Blake and Mouton (1978) explained that *versatility* allowed for variation under certain conditions while adhering to basic principles:

There appears to be, in other words, ‘one-best-way’ to design an aircraft, to increase longevity, or to develop strength and boss-subordinate relationships. That way is for decision-making and engineering to be based on scientific principles as verified in basic experimental work and applied with versatility to specific situations. (p. 129)

The concept of versatility formed the basis for understanding a 9,9 orientation and how there could be one-best-way to lead. Versatility was actualized in the variations of the application of 9,9 assumptions. While the situations may change, the underlying

principles of behavior remained unchanged, “what changes is their application. These vary depending on the situation” (p. 130).

Blake and Mouton (1978) observed that organizations with mature relationships demonstrated a trend towards a 9,9 orientation, and they asserted that striving to become 9,9 leaders should be a goal in itself. They posited “achievement of such a 9,9 orientation may be the key to strengthening the free enterprise system and the political democracy on which it rests. Then, a thinking society—which is also thoughtful—will have been achieved” (p. 217).

Leadership Effectiveness

Hersey and Blanchard’s (1988) *Tri-Dimensional Leader Effectiveness Model* was also based partly on two diametric descriptors of behavior which were termed *task behavior* and *relationship behavior*, and also regarded the situation as a factor in determining appropriate leader behavior. This model was distinguished from previously discussed theories/models due to the addition of a third dimension, an *effectiveness* dimension. Hersey and Blanchard recognized that both the leadership style (i.e., task behavior vs. relationship behavior) and the situation affected the results of the initiative. The previously two-dimensional grids became three-dimensional models by adding a dimension of effectiveness; representing *task behavior*, *relationship behavior*, and *effectiveness*. Reddin (1967) was given credit for being the first to incorporate an effectiveness dimension to earlier two-dimensional models with his 3-D Management Style Theory, and greatly influenced the development of Hersey and Blanchard’s model of effective leadership. “A useful typology must allow that a variety of styles may be

effective or ineffective depending on the situation” (Reddin 1967, p. 13). It was the appropriateness of the leadership style with relation to the situation that determined effectiveness (Hersey & Blanchard, 1988).

Consistency in leadership did not mean utilizing the same style all of the time; it meant using an appropriate style for a given situation, in similar situations, and consistently from one person to another. Accomplishing the task immediately at hand could be considered a successful event but leadership effectiveness could be measured only over time, based upon the accumulation of successes and failures. “If managers are both successful and effective, their influence tends to lead to long-run productivity and organizational development” (Hersey & Blanchard, 1988, p. 130). As well, this should hold true for leaders.

Vroom and Yetton (1973) viewed leadership from a decision-process perspective pointing out that there were numerous theories regarding individual decision making and organizational decision making. Vroom and Yetton (1973) explained that organizational decision making required both “*cognitive* and *social* processes” (p. 6), and the social processes aspect of organizational decision making were of utmost importance to leadership. “We are interested in the way in which leadership is reflected in social processes utilized for decision-making, specifically in leader’s choices about how much and in what way to involve their subordinates and decision-making” (p. 5). Reflecting upon a body of empirical evidence supporting a participative style of leadership and recognizing the importance of situational factors influencing leadership effectiveness, Vroom and Yetton (1973) developed the *Leader-Participation Model*: A normative

model that could be used as a tool for determining the extent of participation of subordinates in decision making—dependent upon the situation. Their decision tree model contained five basic assumptions and seven rules that would lead to a subordinate participation decision that would protect “both the quality and the acceptance of the solution and, at the same time, minimize the man-hours consumed by the process of decision-making” (p. 187). There was great potential for the use of such a model given that it would lead to an appropriate decision regarding the level of subordinate participation based on the characteristics of the situation and of the subordinates.

Vroom and Jago (1988) attempted to address some of the shortfalls of the original Vroom and Yetton (1973) model. However, they emphasized that the model did not prescribe one style of leadership over another and the action of choosing alternatives at specific decision points within the model would lead the user to the appropriate conclusion, but stressed that the existence and use of the model did not guarantee success. Effectiveness was also dependent upon the user’s skill in using the model... “The surgeon may choose a correct operating procedure, but its success also depends on the surgeon’s skill in executing the procedure in an appropriate manner” (p. 37). At the time of Vroom and Jago’s (1988) publication, seven validation studies had been conducted to test the truthfulness of the original Vroom and Yetton (1973) model: The model was shown to have predictive value. Detailed accountings of the shortfalls, as well as suggestions for improvements, were available in Vroom and Jago’s (1988) publication. The Leader-Participation Model would lead to an appropriate conclusion through a series of decisions that eliminated alternatives from the feasible sets; a type of process of elimination

whereby the only remaining alternative becomes the answer. However, common themes underlying a number of criticisms included (a) the model allowed for only yes-or-no answers, it did not allow for shades of gray such as “probably yes, maybe, or probably no” (Vroom & Jago, 1988, p. 85); (b) if there were more than one alternatives remaining, then the model did not give guidance as to which alternative to choose; and (c) some critics felt that the model was too complex for simple situations, while other critics felt the model was too simplistic to solve complex problems. Regardless of the criticism the model was “widely respected among researchers in leadership behavior” (Hersey & Blanchard, 1988, p. 116) and has served(s) as a useful guide for many in practice.

Relational Leadership

Komives et al. (1998) defined leadership as “a relational process of people together attempting to accomplish change or make a difference to benefit the common good...it is perhaps redundant to use the term relational leadership” (p. 21) explaining that leadership itself was inherently relational. Studies in management and leadership over the past few decades have increased the overall understanding of behavior in organizational settings and have permitted the development of newer assumptions regarding human nature and human behavior. The relevant theories selected for analyses are *transformational leadership*, *servant leadership*, and *followership*, in keeping with Komives’s et al. (1998) consideration of the major theories associated with relational leadership.

A traditional view of leadership might have painted a picture of a general having inspired his troops and leading into battle his army—following closely behind him. A

different picture might have been that of the president standing in front of his/her constituents and creating a vision for the future—for all to follow. The portrayal in both of these pictures was that of a person standing apart explaining what must be done and inspiring others to take action: It was the leader who created the vision of which others would follow. A different leader may have sought the advice and counsel or the collaboration and participation of those that afforded him or her the highest regards. In this case, the leader was once again standing apart from all others having been bestowed with the greater stature; albeit, reflecting or incorporating a more inclusive manner of style.

A premise of *servant leadership* was the leader's goal to be, first and foremost, a servant (Greenleaf, Frick, & Spears, 1996). Closely resembling transformational leadership the factor differentiating servant leadership was the *intent* of the person seeking a leadership role. Komives's et al. (1998) explained that it was the servant leader's intention or "motive of putting the needs of others before his or her own needs" (p. 45) that transformed the servant into the leader. The method used for exercising power was another important characteristic of a servant leader. Greenleaf et al. (1996) explained that it was not only the intentions or motives of the servant leader that must be noble, but also "noble means must also be employed, and *persuasion* is the approach of choice for a servant-leader...the value of coercive power is inverse to its use—more so every day" (pp. 103-116).

Greenleaf et al. (1996) expanded the concept of servant leadership to include institutions explaining that a business could become a serving institution. Two factors

emerged upon examination of the institution; those two factors being the *work* and the *person*. Greenleaf et al. (1996) stated “the work exists for the person as much as the person exists for the work” (p. 117) explaining that the major purpose of an institution was to provide work for people as much as providing goods and services to consumers. Greenleaf et al. (1996) believed that through becoming a serving institution it would be possible to attract the most talented people and through creating an environment for people to grow—then those talented people would never want to leave and it would be through serving those talented people that the business would be successful. Whether it be an individual or an institution, their dedication in the service of others would be reciprocated by being regarded as a leader in the eyes of those which who were served.

Followership

An important aspect of relational leadership is *followership*. Kelley (1992) noted that during the 1990s it was revealed most people were both leaders and followers, which did not seem to be anything new given the research done in the areas of behavioral and situational leadership. However, Kelly (1992) was not emphasizing that each person was capable of being a leader or follower; he was making the point that followership was underrated. Most prior research had focused on leadership, and his contention was that “emphasizing leadership to the exclusion of followership breeds a single-minded conformism” (p. 8). Leadership did not exist without followership and followership was “*the* important phenomenon to study if we are to understand why organizations succeed or fail” (p. 5). Kelly's (1992) writings helped to bring about a better understanding of followers. Leaders needed to understand followers’ motivations in order to prevent them

from leaving. One way to understand followers' motivations was to understand one's followership style through the use of a followership questionnaire. Firstly the questionnaire indicated the individual's followership style; secondly it indicated followership skill strengths and revealed weaknesses in skills that required improvement. It was important to have a balanced skill set as Kelly (1992) stated, "It is like people who have well-developed cognitive skills but no insight into their emotions. The imbalance can be catastrophic" (p. 88).

Kelly's (1992) studies revealed two primary dimensions underlying the concept of followership which included (a) the best followers were described as being independent and capable of critical thinking, and (b) they knew how to benefit their own organizations by working well with leaders and other team members. Exemplary followers possessed characteristics that were individual in nature, and organizational in nature. Exemplary followers did not just take from the organization; they also gave back to the organization.

Kelly (1992) also portrayed leadership from the followers' perspective:

- Followers would design their "model" leaders to
 - "Embrace exemplary followers as partners or co-creators...
 - Demonstrate the value they add to followers' productivity" (p. 202).
- Followers' viewpoint, leaders add value in two ways
 - "Create environments where exemplary followers flourish...
 - Be less a hero and more a hero maker" (p. 213).

This view of leadership was very different from a typical view where the leader played a more important role than did the followers. Leaders and followers were partners in the

business with very different, but equally important contributions to make for the going concern of the enterprise. Any leader could attract followers, but “the ultimate test of leadership is the quality of the followers” (Kelly, 1992, p. 229).

Comparing Leadership Theories and Models

Hersey and Blanchard (1988) defined the leadership process as a function of a *leader*, *follower*, and other *situational* variables: $L=f(l,f,s)$. As I traced the evolution of leadership theory, I found that early theories believed leaders (i.e., Great Men) were born. In some cases, the situation was considered to be important; for example in crisis situations persons born with leadership qualities or traits would rise to fulfill the needed leadership role. Trait theorists and behavior theorists both conceded and accepted that the situation played an important role in determining who would become a leader and who would be an effective leader. It was shown that the most effective models, for determining the appropriate leadership style, were contingent upon the situation (i.e., contingency leadership models).

Vroom and Jago (1988) considered McGregor's Theory Y and Blake and Mouton's 9,9 Leadership Style as noncontingency models. I disagree with Vroom and Jago's assertions that these models were not influenced by the situation because (a) McGregor (1960) concluded that Theory Y was not appropriate in all cases, therefore I would argue that the situation influenced leadership style; and (b) the versatility of Blake and Mouton's 9,9 model required that the situation be considered in the application of a 9,9 leadership style, also demonstrating that the situation influenced leadership. I do agree, however with Vroom and Jago that these particular models of leadership did not

explicitly consider the situational requirements, but the situation influenced the type of leadership interaction and their application none-the-less.

Is there one-best-way to lead? One might have agreed with Fiedler and Chemers and assigned individuals different leadership styles based upon the situation (i.e., situational favorableness) and matching the leader's style with the situation to increase overall effectiveness, or Hersey and Blanchard's Tri-Dimensional Leader Effectiveness Model that also matched leadership style with the situation—where the appropriateness of the style relative to the situation determined leader effectiveness. In these cases, the consistency with which the leader applied different leadership styles in similar situations was important. Others might have agreed with Blake and Mouton that there *is one-best-way* to lead and *that one-best-way* should be based on principles of human behavior, and the variation (i.e., versatility) being in the application of *that one-best-way* and being applied consistently in similar situations. Vroom and Yetton (1973) developed a normative model that used a decision tree to guide decision makers to the appropriate leadership-participation style based upon situational demands; Vroom and Jago (1988) made revisions to address shortcomings that were identified in the original model.

Kelly's (1992) presentation of followership reminded us that the capability, of being a great leader, becomes meaningless without followers, and what made a great leader was the ability to attract exceptional followers. Kelly (1992) was not the first to describe the importance of followership: Followers were included as a situational variable in other theories presented; however, Kelly (1992) emphasized the importance of

followership in the success of the leader-follower relationship and in the success of the organization.

Differentiating Leadership from Management

Since ancient times and through the early 1900s, there was a clear demarcation between the roles and definitions of management and leadership. The middle decades of the last century saw the terms management and leadership being used interchangeably as if they were almost equivalents. I say almost equivalents because it was still recognized that management focused primarily on the operational tasks of the enterprise while leadership set the strategic direction of the enterprise. Why did this convergence of management and leadership theories take place?

The convergence took place as a result of advances in the social sciences related to human behavior—specifically motivation and interpersonal relationships. An increased understanding of the principles of human behavior led to the development of improved theories and models of leadership and management, as both are functions of human behavior, thus increasing the predictive value and the effectiveness of those models. By definition, a *principle* of human behavior would hold true for either management or leadership; therefore, if management and leadership were both based on the same principles of human behavior, then their convergence should be seen.

Based upon the newer paradigms of management and leadership it seems as though management and leadership have become one and the same? The answer is clearly no. There exists a continuum with management at one end (i.e., operations of the

enterprise), and leadership at the other end (i.e., direction of the enterprise), as shown in Figure 12.

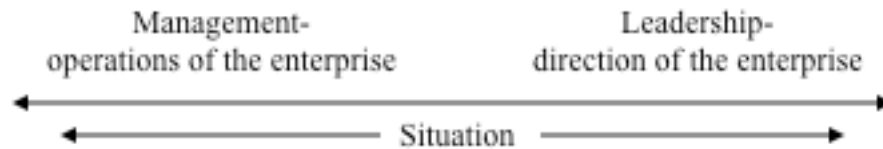


Figure 12. Management-leadership continuum.

Moving along the continuum between management and leadership, the situation determines whether a person is providing management or leadership.

True Leadership

What happened to the concept of *True Leadership*? The kind of leadership that inspires hope in those without hope, action in those of inaction, and of morality in those immoral? Moral leadership was based upon the “fundamental wants and needs, aspirations, and values of the followers” (Burns, 2010, p. 4). Moral leadership was considered one of the underpinnings of *transformational leadership*; leadership that promised the fulfillment of the higher values held by followers and had the potential to transform them into leaders. Raising followers up and instilling a moral attribution upon the leader transforms the role and perception of the leader. The new conceptual framework for leadership is one with a higher ethical standard, a higher morality, a common purpose, the relationship between the leader and follower that transforms them both into agents for positive social change. Komives et al. (1998) described transformational leadership as when “The moral purposes of both leaders and participants are the key factors in the transforming leadership process. Change results from these

shared moral purposes” (p. 257). The effect of moral purpose on leadership is shown in Figure 13.



Figure 13. Transformational leadership continuum.

The strength of moral purpose in leaders and followers will determine the leadership effectiveness in social change for the common good.

Management and leadership are important to organizations and also society. The situation determines whether autocratic or participative management is required. The situation determines whether task-oriented or relationship-oriented leadership is required. A reciprocal relationship exists between leaders and their followers. The recognition of the importance of followers to the organization, as of equal importance to the success of the organization as the leader, creates an environment where mutual respect and consideration cultivates mutual behaviors for the benefit of the common good, not only for those directly involved, but also for the common good of whoso are affected by their actions.

Conceptual Framework

The use of a conceptual lens in qualitative research provides an overall orientation for the study (Creswell, 2009). The lens provides the means for projecting a perspective that influences the research question(s), the research strategy, and the actions required to facilitate social change. In this study, the exploration of Hispanic women executives' lived business experiences, and self-perceptions were viewed through a lens informed by the concepts of intersectionality, bicultural competence, and emotional intelligence.

Intersectionality

Crenshaw (1989) was often given credit for coining the term intersectionality (Davis, 2008; McCall, 2005; Nash, 2008); however, the concept of a *complexity and diversity of female experience* had previously been introduced by hooks (1984), and using similar terms (McCall, 2005; Walby, Armstrong, & Strid, 2012). Intersectionality began in the feminist movement as a tool that advanced the concept of structural inequities beyond the simple addition of categories (i.e., gender + race + class = inequity), and shifted towards a theoretical recognition that these structural categories intersected and produced complex relationships (Egeland & Gressgard, 2007; Walby et al., 2012; Acker, 2006) as shown in Figure 14.

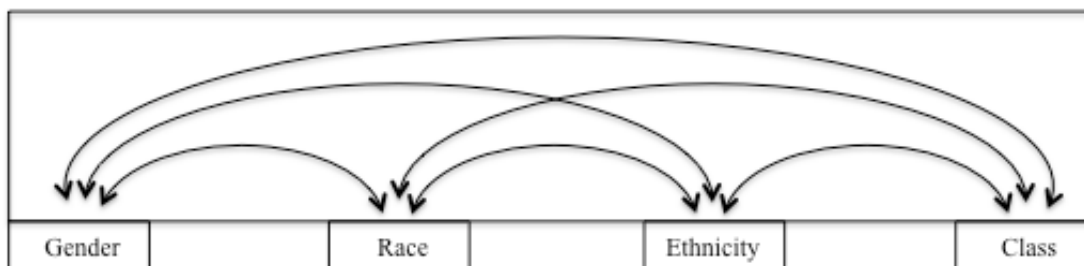


Figure 14. Complexity of intersectionality.

Intersectionality is a suitable approach for the exploration of lived experience as a means of accounting for complexity and points of intersection (McCall, 2005; Valentine, 2007). Choo and Ferree (2010) and Davis (2008) explained that the ambiguous and open-ended nature of feminist intersectionality as a theoretical approach has led to multiple meanings that may or may not be desirable. However, the nonspecific nature of feminist intersectionality provides flexibility and a framework for exploring how *race becomes gendered* and how *gender becomes racialized*, etc.. In this study, the lived experiences of being a Hispanic women executive were explored considering the complexity and diversity of female experience (i.e., intersectionality).

Bicultural Competence

The construct of bicultural competence originated from the alternation model of second-culture acquisition (LaFromboise, Coleman, & Gerton, 1993). Bicultural individuals could be described as those who have been exposed to and have internalized two cultures (Benet-Martinez et al., 2002; Hong et al., 2000; Nguyen & Benet-Martinez, 2007, 2013). Nguyen and Benet-Martinez (2007, 2013) explained biculturalism was a form of acculturation reflecting a bidimensional or two-directional dynamic process between the dominant culture and the nondominant culture(s). A study conducted by Nguyen and Benet-Martinez (2013) showed a “significant, strong, and positive association between biculturalism and adjustment (both psychological and sociocultural)” (p. 122). In this context, psychological adjustment referred to psychological and emotional well being while sociocultural adjustment referred to behavioral competence. Various abilities associated with bicultural competence include an individual’s ability to

navigate both the dominant and the nondominant cultures (LaFromboise et al., 1993); the perceptions of increased intellectual flexibility and creativity (Benet-Martinez, Lee, & Leu, 2006); and the capacity to acknowledge competing perspectives and to forge the conceptual links between these perspectives (i.e., differentiation and integration), as functions of integrative complexity in a bicultural context (Suedfeld, Tetlock, & Streufert, 1992; Tadmor & Tetlock, 2006; Tadmor, Tetlock, & Peng, 2009).

The study of bicultural people, as in this proposed study, provides opportunities to view cultural diversity in organizations differently by valuing the cultural diversity that exists *within* individuals; as well as, the cultural diversity *between* individuals (Brannen & Thomas, 2010). Hong (2010) provided a conceptual model of bicultural competence that “identified the critical dimensions of bicultural competence in cross-cultural interactions” (p. 110), and associated bicultural competence with the specific multicultural team roles that advanced multicultural team effectiveness (i.e., boundary spanner, conflict mediator).

Emotional Intelligence

Emotional intelligence (EI) has been defined as the capacity to solve problems through the management of one’s emotions and those of others (Corona, 2010; Mayer & Salovey, 1993; Mayer et al., 2004; Salovey & Mayer, 1990). EI is a type of social intelligence consisting of the interaction between emotions and thought whereby the sensitivity to emotions (i.e., emotional awareness) allows emotionally competent people to direct their own actions and the actions of others in productive ways (Corona, 2010; Mayer et al., 2004). Jorfi and Jorfi (2012) conducted a study that showed a significant

and positive relationship between EI and communication effectiveness while Corona (2010):

- Found that test scores for Hispanic Americans' emotional awareness were significantly higher than normative data scores—demonstrating high levels of communication and social skills.
- Found significant differences between Hispanic Americans' transformational leadership scores and normative data scores.
- Suggested a linkage between bicultural Hispanic Americans, higher EI scores, and effective leadership.

Alternatively, Weinberger's (2009) study concluded that there was no relationship between IE, a leader's style, and a leader's organizational effectiveness. EI was considered in this study to the extent the participants felt it was a factor that influenced their leadership and organizational effectiveness.

Gender and Ethnicity as Determinants of Effective Leadership

Eagly, Johannesen-Schmidt, and van Engen (2003) conducted a meta-analysis to address issues of gender and leadership styles. The results showed (a) transformational leadership style might be more congenial to women and mitigate role incongruity, and (b) there were positive correlations between all of the components of transformational leadership and leaders' effectiveness. In a separate study, Galante (2010) found that Mexican American women in leadership roles considered their Hispanic culture a positive influence fostering abilities consistent with transformational leadership.

Self-efficacy has been considered an important characteristic for successful leadership (Bandura, 1997; Bass, 1990). “Self-efficacy is concerned not with the number of skills you have, but with what you believe you can do with what you have under a variety of circumstances” (Bandura, 1997, p. 37). In a study of Latina leaders in higher education, Montas-Hunter (2012) found all of the study participants considered high self-efficacy a factor in their success. Although self-efficacy is related to one’s perceptions of one’s abilities, the judgments of others might affect its measure. Wang, Hinrichs, Prieto, and Black (2010) studied “the effect of followers’ behavior on a leader’s self-efficacy to lead (leader efficacy)” (p. 139) with consideration given to gender and ethnicity. The findings showed gender and ethnicity moderated the effects of followers’ behavior on leader efficacy. A partial summary of their results is shown in Table 4.

Table 4

Followers’ Behavior and Leader Efficacy by Gender and Ethnicity

Feedback	Increase/Decrease in Leader Efficacy			
	Male	Female	Hispanic	Non-Hispanic
Positive Follower Feedback	No Effect	No Effect	No Effect	No Effect
Negative Follower Feedback	Lesser Decrease	Greater Decrease	Lesser Decrease	Greater Decrease

Note. Adapted from “*The effect of followers’ behavior on leader efficacy,*” by L. Wang, K. T. Hinrich, L. Prieto, and J. A. Black, 2010, *Journal of Business and Management*, 16(2), pp. 139, 142, 145. Copyright 2010 by Argyros School of Business and Economics, Chapman University.

Does gender and ethnicity influence leadership effectiveness? Gender and culture (ethnicity) matter as gender-role identities and cultural values influence leadership behavior choices (Ayman & Korabik, 2010). Therefore, if gender and ethnicity influence leaders' behavior, and if that influence extends to creating differences in typical leadership behavior, then gender and ethnicity become determinants of effective leadership.

Related Key Concepts

Occupational Segregation

Mukherjee (2002) described occupational segregation as the “inequality in the distribution of people across occupations” (p. 1) with variables of interest including gender, race, ethnicity, and national or regional differences. Villanueva (2002) found in the United States that the occupational segregation that Latinas experience becomes normalized as racializing practices segregate Latinas from European-American women in every facet of social life. A study conducted by Tomaskovic-Devey et al. (2006) showed sex and race/ethnic employment segregation *declined noticeably* in the U.S. between 1966 and 1980, however between 1980 and 2003 only sex segregation declined. Employment segregation by race (i.e., Blacks and Non-Blacks) *declined moderately* between 1983 and 2002, however ethnic segregation (i.e., Hispanics and Non-Hispanics) *increased significantly* over the same period (Queneau, 2005, 2009). Furthermore, there has been no noticeable improvement in occupational gender segregation, by race and ethnicity, since 1996 (Hegewisch et al., 2010).

There are a number of theories explaining the causes of occupational segregation (i.e., why it happens), however there is very little known about the mechanisms or processes that cause occupational segregation (i.e., how it happens) according to various scholars (Krymkowski & Mintz, 2008; Reskin, 2003; Reskin, McBrier, & Kmec, 1999; Stainback, Robinson, & Tomaskovic-Devey, 2005). Estévez-Abe (2005) identified three categories of explanatory theory:

- Economic theories that include (a) human capital theory that considers education and skill levels as factors of occupational segregation, and (b) statistical discrimination theory that considers the behavior of employers; for example, the avoidance of hiring women due to the higher statistical probability that they will quit for family reasons, or the assignment of men and women to different jobs based upon gender assumptions.
- Cultural theories that favored nonrational factors such as employers' preferences and cultural norms, and recognized that discriminatory hiring practices arose from assumptions regarding gender appropriate social roles.
- Institutional theories that focused upon laws and programs that were “designed to promote and protect women” (p. 185).

In addition to these theories that explained why occupational segregation happens, Reskin (2003) suggested “exploring contextual and structural effects” (p. 14) as a means of identifying the mechanisms or processes that require, allow, or prevent differential treatment and impact occupational inequality. In other words, the contexts and structures

do not themselves impact occupational inequality, but studying the effects upon them may help identify the mechanism or processes impacting occupational inequality.

Occupational segregation matters in a business context because employers are restricted to a smaller and less motivated pool of qualified candidates, which affects organizational productivity negatively (Hegewisch et al., 2010; Queneau, 2005).

Occupational segregation matters in a social context because it provides a measurement of progress associated with wage gap analysis and the economic status of minorities (Hegewisch et al., 2010). This concept was important to this study because the low participation rate of Hispanic women in management, professional, and related occupations is a manifestation of occupational segregation.

Organizational Effectiveness

Organizational effectiveness is often associated with leadership effectiveness, however Vroom and Jago (2007) explained the importance of considering each concept individually because there were many factors that could influence organizational effectiveness “other than the quality of its leadership” (p. 18), and leaders could influence organizational effectiveness in other ways that would not typically be considered leadership functions.

Culture creation, culture evolution, and culture management defined leadership (Schein, 1992). Schein (2004) explained the influential forces of culture in social and organizational situations were powerful; culture and leadership were “two sides of the same coin” (pg. 1) and felt the ultimate challenge of leadership—the *essence* of leadership—was the ability to recognize limitations of the existing culture and bring

about cultural change that was adaptive (i.e., to create a culture that could evolve in an adaptive manner). Ultimately “cultural understanding and cultural learning start with self-insight” (Schein, 1992, pg. 392). Leaders and organization members must recognize how their organization’s culture, norms, and biases affect their personal perceptions, thoughts, and feelings.

Organizational effectiveness relates to how well an organization was able to achieve its goals (Chi et al., 2012; Lusthaus et al., 2002; Lusthaus et al., 1997). Chi et al. (2012) conducted a study that demonstrated how organizations could benefit from considering how the behavioral elements of leaders *and* the characteristics of other group members influenced organizational effectiveness. Organizational effectiveness measures often focus upon the “leader as the unit of analysis” (Kaiser & Overfield, 2010, p. 167) with ratings being associated with measures of individual performance, whereas the purpose of leadership is the pursuit of a common goal, and measures of organizational effectiveness should be reflective of the group’s performance in reaching that goal. In this study, the self-perceptions of contributions to organizational effectiveness (i.e., group’s performance) and the cultural change aspects of the participants’ leadership were explored.

Qualitative Research Design

Science is sometimes described as a process containing a beginning, a series of actions, and the result (Singleton & Straits, 2010). Scientific research is a process beginning with a question or inquiry that was followed by a series of evidence gathering activities and finished with analyses and conclusions. The research design is the

researcher's plan; it represents how the researcher will conduct research. There are a number of research approaches available (i.e., qualitative, quantitative, mixed method) and various research strategies (i.e., experimental, non-experimental, quasi-experimental, evaluation, grounded theory, phenomenology, ethnography, case study, etc.). The strength of the study is dependent upon matching the approach, strategy, and methods that best addressed the research concerns and research questions.

Philosophical Paradigms and Research Designs

Klemke, Hollinger, Rudge, and Cline (1998) began their discussion of the philosophy of science by explaining what it was *not*. "The philosophy of science is not the history of science" (p. 19). The authors admitted that occasionally the philosophy of science could not be fully appreciated without including a historical element, but the two should not be confused. The "philosophy of science is not metaphysical cosmology or 'philosophy of nature'" (p. 19). Klemke et al. (1998) explained the philosophy of science might support the development of cosmological theories regarding nature and the universe; however the distinction between the two concepts must be maintained. The "philosophy of science is not the psychology or sociology of science" (p. 19) which would suggest the characterization of the study of science as an activity (i.e., the study of social phenomenon or behavior). The philosophy of science would support these scientific inquiries, again they must be distinguishable philosophical concepts. The philosophy of science *is* the pursuit of understanding the meaning, methods, and logical structures of science through the use of the scientific method to analyze the meaning,

methods, and logical structures of science (Klemke et al., 1998). The philosophy of science questions the meanings of science constructs:

- What determines adequate scientific explanation?
- What is the relationship between scientific explanation and prediction?
- What are scientific laws?
- What are scientific theories and their relationships to scientific laws?
- What is determinism?
- Is social science true science?
- Etc.

The distinction between science and the philosophy of science should be apparent, however a circular conception is justifiable: The former describes a process of structured inquiry while the latter questions the meanings and forms of the structured inquiry itself.

Qualitative research designs shun rigorous tests of hypotheses and quantification, as contrasted with quantitative research designs (Bailey, 1982). Qualitative designs are used when exploring and expanding understanding of people, concepts, or phenomenon. Researchers might also use a qualitative research design when the project is exploratory in nature: “researchers use it to explore a topic when the variables and theory base are unknown” (Creswell, 2009, p. 98). A key characteristic of qualitative design is the possibility of *Verstehen*; the Weberian interpretation being that of having a direct understanding between the researcher and the participant(s) under study (Bailey, 1982). This kind of direct understanding is possible when the researcher empathizes with

another person or group because he or she has experienced a similar event or situation, or also be described as the researcher's subjective interpretation of the facts.

The philosophical ideas (i.e., worldviews) underlying a research project can partially explain *why* the researcher chooses a particular research design (Creswell, 2009; Hoover, 1980; Robson, 2002; Trochim, 2001). Table 5 illustrates the four major paradigms and their generally associated research design(s).

Table 5

Four Philosophical Worldviews

Philosophical Paradigm	Research Design
Constructivism Understanding Multiple participant meanings Social and historical construction Theory generation	Qualitative
Postpositivism Determinism Reductionism Empirical observation and measurement Theory verification	Quantitative
Pragmatism Consequences of actions Problem-centered Pluralistic Real-world practice-oriented	Mixed methods
Participatory/Advocacy Political Empowerment Issue-oriented Collaborative Change-oriented	Qualitative or Mixed methods

Note. Adapted from “*Research design: Qualitative, quantitative, and mixed methods approaches*,” by J. W. Creswell, 2009, p. 6, Thousand Oaks, CA: Sage. Copyright 2009 by SAGE Publications, Inc.

In this research study, I sought to understand the meanings, essences, and self-perceptions of the lived experiences of multiple participants. Based on the data in Table 5, choosing a qualitative research design incorporating a constructivist philosophical paradigm was an appropriate choice.

Strategies of Inquiry and Methods

Research strategies of inquiry are the sets of working concepts and procedures used in the process of scientific research. Research strategies were also referred to as methodologies (Creswell, 2009). Bailey (1982) explained that research strategies included the values and assumptions for framing research activities; influenced the form of the hypothesis statement; determined the correct level of evidence required; set standards and criteria for interpreting data and reaching conclusions; etc. Research strategies (i.e., methodologies) provided structure and procedures that supported the philosophical paradigm and the research design. Table 6 shows the research designs and their associated strategies of inquiry (i.e., methodologies).

Table 6

Association Between Research Design and Methodologies

Research Design	Methodologies
Quantitative	Experiments Surveys
Qualitative	Ethnography Phenomenology Grounded theory Case Study
Mixed method	Transformative Sequential Concurrent

Note. Adapted from “*Research design: Qualitative, quantitative, and mixed methods approaches*,” by J. W. Creswell, 2009, p. 12, Thousand Oaks, CA: Sage. Copyright 2009 by SAGE Publications, Inc.

A phenomenological strategy of inquiry was selected for this study supporting the exploration of the lived business experiences and self-perceptions of 12 Hispanic women executives.

The strategy of inquiry (i.e., research methodology) was a philosophical view of the research process influencing certain aspects of the research design, while research methods were merely the tools selected for data collection (Bailey, 1982). However, Denzin (1970) argued the methods chosen by the researcher should also support the theory underlying the research. The selection of the research methods by the researcher determined how data will be collected and analyzed, influenced the type of data to be collected, how participants were selected, the form and voice of the writing, etc. The research methods selected determined how the researcher(s) interacted with their environment, with differing methods leading to different interpretations of their research

and views of reality. There were many factors to consider when selecting the research methods for the project, not only was there a presupposition of an association between research strategies and research designs, but also an association supposed between methods and strategies of inquiry (i.e., methodologies), as shown in Table 7.

Table 7

Association Between Methodologies and Methods

Methodologies	Methods
Experiments and Surveys	Predetermined approaches Closed-ended questions Numeric data
Ethnography, Phenomenology, Grounded Theory and Case Study	Emergent approaches Open-ended questions Imagery or text forms of data
Transformative, Sequential, and Concurrent	Predetermined and emergent approaches Closed-ended and open-ended questions Numeric, imagery, and text forms of data

Note. Adapted from “*Research design: Qualitative, quantitative, and mixed methods approaches*,” by J. W. Creswell, 2009, p. 17, Thousand Oaks, CA: Sage. Copyright 2009 by SAGE Publications, Inc.

A phenomenological strategy of inquiry was selected permitting emergent themes to develop from the rich and detailed descriptions of lived experience provided by participants through the use of open-ended questions.

Theory and Phenomenological Research

Theory in qualitative research may appear in various forms depending on the type of research strategy employed. The logical process of a qualitative study is an inductive reasoning process. *Inductive* reasoning progresses from the specific observations towards

a general theory while *Deductive* reasoning progresses from a general theory towards the specific observations, as shown in Figure 15.

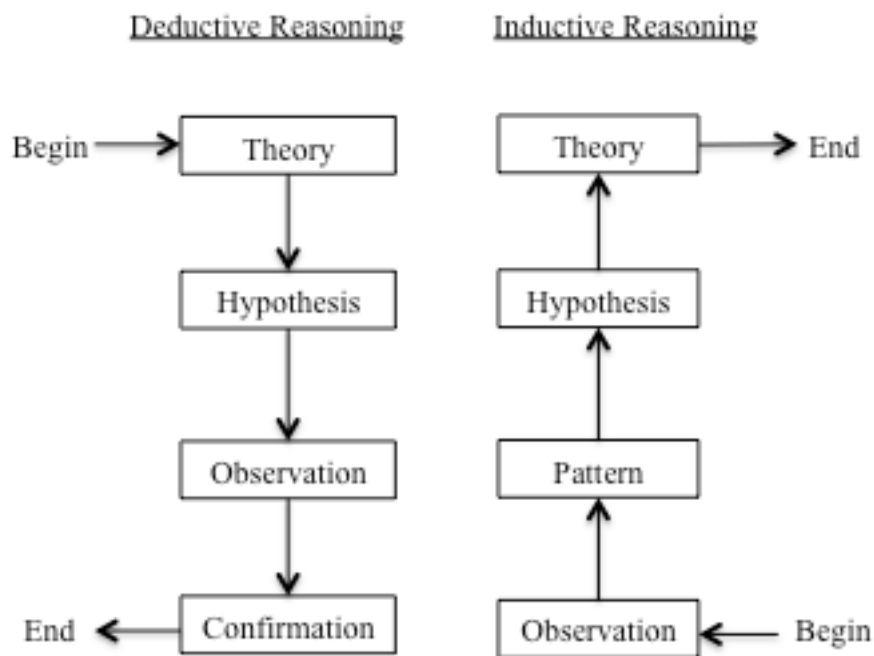


Figure 15. Deductive reasoning and inductive reasoning process flows. Adapted from “*Research design: Qualitative, quantitative, and mixed methods approaches*,” by J. W. Creswell, 2009, pp. 57, 63, Thousand Oaks, CA: Sage. Copyright 2009 by SAGE Publications, Inc.; “*Research methods knowledge base*,” by W. M. K. Trochim, 2001, pp. 17, 18, Cincinnati, OH: Atomic Dog Pub. Copyright 2001 by William M. K. Trochim.

“All deductive theorizing is excluded from phenomenology” (Husserl & Gibson, 1931, p. 210). This declaration was made establishing transcendental phenomenology as the descriptive science of Essential Being. Placed in juxtaposition with the mathematical sciences of exactness phenomenology addressed that which was missing from a priori science: “describe and determine with *rigorous* conceptual precision the generic essence of perception” (p. 210). The experience of the individual and the essence of what makes

it “what it is” became what are known as the human scientific study of phenomena (i.e., phenomenological research).

Phenomenological research was described as the study of lived experience (Van Manen, 1990). A characteristic of lived experience is that of being lived; it cannot be reflected upon while one is actively engaged in living the experience; for to reflect upon the experience *while living it* would transport oneself outside of the experience. But the questions of phenomenology remain, “what are these experiences like?” and “what are the meanings of these everyday experiences?” These questions were answered through retrospective reflection—the recollections of experiences already lived.

Husserl and Gibson (1931) posited the new science of “phenomena” as something quite different from all of the sciences that dealt with realities, and those differences would need to be communicated strongly if the phenomenological standpoint and distinctive nature were to gain ground scientifically. “*Transcendental phenomenology will be established not as a science of facts but as a science of essential Being* (as ‘eidetic’ Science); a science which aims exclusively at establishing “knowledge of essences” (*Wesenserkenntnisse*) and *absolutely no ‘facts’*” (p. 44). Phenomenology was considered a pure descriptive discipline emanated from an individual’s consciousness and incarnated through pure intuition.

Husserl provided a systematic approach that focused upon subjectivity, and the exploration of the essences of experience reflected in the appearances of objects only available to one’s consciousness (Moustakas, 1994). Husserl’s phenomenology encompassed “stepping outside of our everyday experience, our *natural attitude* as he

called it...instead adopting a *phenomenological attitude* involves and requires a reflexive move” (Smith et al., 2009, p. 12). We must remove ourselves from the everyday experience; turning our attention inward and focusing on our perceptions of experience, and one’s reflection upon the essence of experience and transcendence over the material experiential world with phenomenology being the “experiential content of consciousness” (Smith et al., 2009, p. 12) without presupposition or a priori knowledge; hence, transcendental phenomenology.

Heidegger was a student of Husserl who developed a philosophy of phenomenology that was not only considered being in conflict with Husserl but also considered being consistent with Husserl, depending upon the perspective and temporal period of their lives (Luft, 2011). Heidegger (1982) considered phenomenology a “*method of philosophy understood as ontology*” (p. xvii)—the study of being, and considered a priori knowledge important to the understanding of beings, as a person must understand the propositions of ontology and the “understanding of the being of beings is necessarily antecedent to the experience of them as beings” (p. xviii); further explaining, that a person cannot use a hammer as an instrument without understanding beforehand the functional use of the hammer and its relation to hammering. In contrast, as Husserlian phenomenology studied “the things themselves” without presuppositions or a priori knowledge, and seeking only to reveal the essence of experience or being: The conflict between Husserlian philosophy and Heideggerian philosophy emerged. To understand the essence of phenomena a person must be free of presuppositions and a priori knowledge; however, to understand beings a person must have a priori knowledge of being. In short,

Husserl's position was that phenomenology *excluded* a priori knowledge while Heidegger's position was that phenomenology *included* a priori knowledge.

Theories and philosophies evolve over time as the result of contemplation or in response to critical analysis from peers, and after decades or a lifetime of considerations the demarcations between one philosophy and another might become blurred, or gravitate towards complexity, or become unanswerable. Luft (2011) explained that, as a result of new "introductions" to phenomenology and new expositions of the reduction it was difficult even for Husserl to give a "systematic and complete exposition" (p. 85) in defense of his method of phenomenological reduction, from an orthodox perspective. Additionally, the connotations of titles, labels, and phrases could be misleading when presented without context.

We must have a basic understanding of phenomenological philosophy if we are going to apply the phenomenological method correctly (Giorgi, 2010). Giorgi (2010) explained that proper phenomenological research was the combination of human scientific research practices and Husserlian phenomenological philosophy. Many studies have been weakened by the inadequate consideration of these concepts and the subsequent research "lacks methodological rigour, which has implications for the scientific rigour of research and the usefulness of the findings" (Gelling, 2010, p. 5).

Interpretative Phenomenological Analysis (IPA)

The factor that characterized IPA methodology as interpretative analysis was identified through simplifying and distinguishing transcendental phenomenological philosophies. The factor distinguishing Husserlian philosophy from Heideggerian

philosophy was based upon the Epoche process and the extent to which the researcher sets aside their own knowledge, experiences, and preconceptions in order to *hear* the participants' descriptions of the phenomena. Husserlian and Heideggerian philosophies were very much alike; however they differed as Heidegger presupposed that, in practice, the Epoche could never be fully realized or perfectly achieved (Luft, 2011; Moustakas, 1994). Husserlian philosophy implied that the researcher has completely freed themselves from all preconceptions (i.e., complete transcendence) regarding the phenomena under study and the interpretations were based solely upon the participants' descriptions of their experiences, while Heideggerian philosophy implied the researcher retained some knowledge of experience and preconceptions (i.e., partial transcendence)—in fact it is required for understanding and these experiences and preconceptions were incorporated into the researcher's interpretations of the participants' descriptions of experience. IPA methodology follows in the Heideggerian tradition.

Qualitative samples were typically small groups of people within a natural setting and studied in-depth enabling the rich, descriptive remembrances required for data analysis. Maxwell (2005) explained neither probability sampling nor convenience sampling was used in qualitative research. The researcher makes sampling decisions based upon the participants' ability to contribute *purposefully* towards the understanding of the phenomenon or experience under study. For example, criterion sampling works well in a phenomenological study where it was essential that all of the participants have experienced the phenomena that was the subject of study (Creswell, 2007; Preissle & LeCompte, 1984).

Moustakas (1994) stated there “are no in advance criteria for selecting the research participants” (p. 107) aside from the obvious considerations of age, gender, race, etc.; emphasis was placed upon the participants’ willingness to be part of the research project, share their experiences of the phenomenon, and gain a better understanding of the experience themselves. The selection of participants for an IPA study was based upon access to a particular perspective rather than a population; also, a certain level of homogeneity in the sample centered around factors relevant to the study could reveal important convergent and divergent patterns within the common experiences under study (Smith et al., 2009). The participants’ represented the phenomenon from their various perspectives individually and taken collectively these partial descriptions created a contextual understanding with more fullness and clarity (Vagle, 2010).

The sample size is also an important question when developing a sampling strategy as phenomenology is interested in the collection of vivid and detailed information from each person participating. The phenomenological focus is the understanding of common experiences from a few participants through in-depth inquiry, rather than through the aggregation and generalization of the experiences from many participants. Creswell (2007) recommended three to ten participants in a phenomenological study because a large number of participants in an IPA study could be a contributing factor in yielding a poor evidence base. Smith (2011) explained that more than eight participants could lead “to a large number of descriptive/superficial themes” (p. 17). Smith et al. (2009) suggested three to six participants were reasonable for an IPA

study. A small sample in IPA includes one to three participants, a medium sample four to eight participants, and a large sample more than eight participants (Smith, 2011).

The research questions and the methods used to collect data (i.e., interview questions) are discrete parts of the research design and the interview questions do not “necessarily resemble, or follow by logical deduction from, the research questions” (Maxwell, 2005, p. 91). The data collection methods employed in the study were the tools or means, for obtaining the information to answer the research questions. The interview questions were designed to be effective in obtaining the type of information (i.e., data) needed in a specific research situation; they are not logical transformations of the research questions. The relationship (i.e., linkage) between the research questions and the data collection method needs to exist, albeit this is an empirical relationship, not a logical one (Maxwell, 2005). If the methods chosen for data collection will not obtain the information needed to answer the research questions, the researcher must change the methods or change the research questions. IPA research questions should reflect an exploratory attitude and openness and focus on the meaning of events. The research questions should be straightforward; they are designed to inquire upon the lived experiences of people and should not be complex. Smith et al. (2009) explained that IPA questions and answers were necessarily open, additionally IPA allows the flexibility of replacing one realizable objective (i.e., research question) for another—reflecting emergent themes resulting from the analysis of data.

An interview could be considered a basic mode of inquiry. The main purpose of the in-depth interview was to understand the lived experiences of others and the

meanings they ascribed to those experiences (Loureiro Alves Jurema, Correia Pimente, Cordeiro, & Austregésilo Nepomuceno, 2006; Seidman, 2006). A variation of the *three-interview series* model designed by Dolbeare and Schuman (Schuman, 1982) (as cited in Seidman, 2006) was used in this study that facilitated the development of context and lead to an increased understanding of the participants' experiences. Oftentimes researchers who attempt to explore a topic using a single interview with participants whom they have never met, might not obtain enough information to develop a context, moreover it would be difficult to explore the meaning of an experience in the absence of context (Patton, 2002; Seidman, 2006).

The data collection process in a phenomenological study can be divided into four activities including participant interviews, recording information, resolving field issues, and storing data. The four interrelated activities can be presented as in Figure 16.

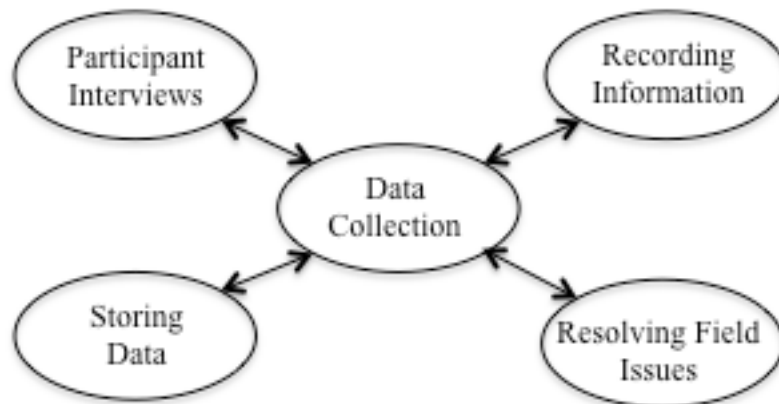


Figure 16. Phenomenological research data collection activities. Adapted from “*Qualitative inquiry and research design: Choosing among five approaches*,” by J. W. Creswell, 2007, p. 118, Thousand Oaks, CA: Sage. Copyright 2007 by SAGE Publications, Inc.

Additional information regarding the data collection processes of this study is presented in Chapter 3.

The researcher begins the data collection process and soon experiences how quickly the data accumulates. The researcher must develop a process of tagging (i.e., coding) information in order to prevent data overload and to assist in data retrieval (Miles & Huberman, 1994). Coding was essential to analysis and it was more than just a process of labeling; it was a linking process that “leads you from the data to the idea, and from the idea to all the data pertaining to that idea” (Richards & Morse, 2007, p. 137) (as cited in Saldaña, 2009). Auerbach and Silverstein (2003) presented a three-phase six-step process for transforming raw data into a meaningful narrative, as shown in Table 8.

Table 8

Transforming Raw Data Into Meaningful Narrative Through Coding

Phase	Steps
Making the Data Manageable	<ol style="list-style-type: none"> 1. Explicitly state the research concerns* and theoretical framework. 2. Select the relevant text for further analysis as viewed through the lens of step 1.
Hearing What is Said	<ol style="list-style-type: none"> 3. Cluster related passages of relevant text. 4. Organize themes by assigning clusters to coherent categories.
Developing Meaning	<ol style="list-style-type: none"> 5. Construct descriptions of meanings/essences of the experience for each participant by combining categories into more abstract concepts. 6. Develop a composite description of meanings and essences of the experience in terms of the theoretical constructs.

Note. *Research concerns are more general and inclusive than research questions. Adapted from “*Qualitative data: An introduction to coding and analysis*,” by C. F. Auerbach, and L. B. Silverstein, 2003, p. 43, New York, NY: New York University Press. Copyright 2003 by New York University.

Each research study was unique, and the coding method(s) selected by the researcher depended upon the type of study and goals of the study. A single method may be sufficient or in more complex situations two or more methods may be required, however as Saldaña (2009) explained the researcher should not complicate the analytic process by “employing too many methods for one study (i.e., 10 First-Cycle coding methods) or integrating incompatible methods (i.e., an Exploratory Method with a Procedural Method)” (p. 47). Table 9 lists a number of coding methods permissible in phenomenological studies. In this study, first-cycle coding included elemental methods and second-cycle coding included pattern coding.

Table 9

First and Second-Cycle Coding Methods Appropriate for Phenomenological Studies

First-Cycle Methods	Second-Cycle Methods
<p><i>Grammatical Methods</i>-refers to the basic grammatical principles of the technique:</p> <ul style="list-style-type: none"> ▪ <i>Attribute Coding</i>-basic descriptive information for data management and essential participant information. <p><i>Elemental Methods</i>-lenses for reviewing the data and building a foundation for future coding cycles:</p> <ul style="list-style-type: none"> ▪ <i>Structural Coding</i>-summarizes in a word or phrase the “content or concept” of a passage from a research question perspective. ▪ <i>Descriptive Coding</i>-summarizes in a word or phrase the “basic topic” of a passage (i.e., the topic as in what is being talked <i>about</i>). ▪ <i>NVivo Coding</i>- a word or phrase used by the participant extracted from the actual language in the data record, to summarize, a passage. <p><i>Literary and Language Methods</i>-based upon approaches to the analysis of literature and oral communication:</p> <ul style="list-style-type: none"> ▪ <i>Narrative Coding</i>-exploration of intrapersonal and interpersonal participant experiences through story. <p><i>Exploratory Methods</i>-preliminary coding assignments until a more defined method can be applied.</p> <ul style="list-style-type: none"> ▪ <i>Holistic Coding</i>-a single code assigned to a large passage reflecting the general contents and possible categories. <p><i>Themeing the Data</i>-an extended descriptor (i.e., phrase or sentence) identifying what the passage is <i>about</i> and/or what it <i>means</i>.</p>	<p><i>Pattern Coding</i>-organizes similarly coded data in a coherent manner and then codes are assigned representing the new organization.</p> <p><i>Focused Coding</i>-categorizes coded data based upon similarities in themes or concepts.</p>

Note. Includes coding methods for use in phenomenological research. Adapted from “*The coding manual for qualitative researchers*,” by J. Saldaña, 2009, p. 46, London, UK: Sage. Copyright 2009 by Johnny Saldaña.

Researchers write analytic memos to themselves firstly, and for other researchers secondly; it was a process of documenting a person's reflections and thinking. Saldaña (2009) explained that memos reflect what is going on within the researcher's mind and were not necessarily conclusive. Memos were more likely to be suggestive or creative, unencumbered, and unpredictable (i.e., unscheduled); any thoughts relating to the participants or the researcher were acceptable for inclusion in memos. Memos "are conceptual in intent" (Miles & Huberman, 1994, p. 72) and are used to form groups of related ideas for the development or demonstration of the general concept. Memoing begins as soon as the data becomes available and continues throughout the entire analysis process, as memos link basic ideas to the coding system while encompassing personal, methodological, and substantive aspects of the study (Miles & Huberman, 1994). Stated differently, coding and analytic memo writing are simultaneous processes in which "there is a reciprocal relationship between the development of a coding system and the evolution of understanding a phenomenon" (Weston et al., 2001, p. 397).

Miles and Huberman (1994) also suggested the researcher always give priority to memoing, whenever a thought comes to mind immediately write it down "don't self-sensor" (p. 74), and do not leave ideas that come into mind to your memory. The memos always should be dated, tagged to key concepts being discussed, and linked to specific places in the data. Memos were concept based and should be coded accordingly to facilitate sorting and categorizing; additionally memos comprise a distinct data set and should be kept separate from the data files.

IPA does not prescribe a single method for working with data: IPA employs a flexible design and maintains an analytic focus directed towards the participants' attempts to understand their experiences (Smith, 2011; Smith et al., 2009). Giorgi (2010) cited the flexibility of IPA as a weakness that would lead to "poor science," arguing that prescriptive methodologies for phenomenological studies existed and they needed to be followed if the researcher was to engage in "good science." Chapter 3 will show that IPA implies an underlying prescriptive methodology, albeit one that can be adapted to the researcher's particular situation.

The regulations designed to guide biomedical research with human participants were the source of discussion and frustration for researchers conducting qualitative research with human participants. Denzin and Lincoln (2011) and Prosser (2011) argued the current regulatory environment was too restrictive, and meaningful qualitative research has been rejected for funding, gone unrecognized, or forsaken. However, until the regulatory environment changes it is incumbent upon the researcher to follow the guidelines as established. In phenomenological research, these guidelines include (Creswell, 2007, 2009; Moustakas, 1994; Smith et al., 2009):

- Adherence to the principle of doing no harm.
- Establishing clear agreements with participants.
- Recognizing the necessity of informed consent and confidentiality.
- Disclosing fully to the participant what the research is about and what to expect (i.e., no deception).

- Assuring anonymity for the participant as incorporated within the study design.
- Extending to the participant the right to withdrawal at any time up to the point of data analysis or publication.
- Avoiding the sharing of researcher's personal experiences during interviews, as this may undermine the bracketing process and confound the participant responses.

There is no one-way to address the ethical issues for every phenomenological study as the range and number of perspectives increase within a study so does the level of complexity (Smith et al., 2009), but with proper planning the researcher can protect, inform, and gain the consent of the research participants.

A research design stands upon three legs including a philosophical worldview, strategy of inquiry (i.e., methodology), and methods. Each leg has an important role in developing an appropriate research design for a particular research question or problem. If one leg is weak or missing, then the research design will not be as strong as it could be.

Previous Research Related to This Study

Mukherjee (2002) described occupational segregation as the “inequality in the distribution of people across occupations” (p. 1). The variables of interest in the analysis of occupational segregation included gender, race, ethnicity, and national or regional differences. Villanueva (2002) found, in the United States, the occupational segregation Latinas experience becomes normalized as racializing practices segregate Latinas from European-American women in every facet of social life. Early gender studies were race-

neutral; however the evolution of race-gender studies focused mostly upon Black women and Black men. Hispanic studies focused upon the acculturation of larger populations of the South and Southwest. However, interest has been increasing in the growing Hispanic population, the occupational segregation of Hispanics in general, and specifically in this study the low participation rates in management, professional, and related occupations.

My literature review revealed that research concerning business and professional Hispanic women was spotty. For example, Armijo (2009) examined the challenges that Hispanic women faced in their personal life, family, education, and profession while pursuing a professional career; Galante (2010) investigated the influence of Mexican cultural values on Mexican American leadership roles; González-Figueroa and Young (2005) examined Hispanic women's mentor preferences and their perceptions of professional success; Gonzalez (2012) explored managerial demographic similarity relative to diverse stakeholder groups and its influence on financial performance; Hickey (2009) studied Hispanic underrepresentation in the executive branch of the federal government from the perspective of representative bureaucracy; Sanchez de Valencia (2008) conducted a qualitative grounded theory study and developed a theory and practical leadership model explaining the "transformation of Latinas into influential leaders" (p. iii); San Miguel (2010) revealed the lived mentoring experiences of Hispanic women and the importance of mentors for individual success in science and engineering.

While focusing upon Hispanic women and underrepresentation, these studies highlighted particular aspects of Hispanic women leadership and occupational experiences; however, they failed to explore the lived business experiences of Hispanic

women executives. This phenomenological study fills a gap in the literature by exploring the lived business experiences and leadership self-perceptions of Hispanic women executives and compliments Montas-Hunter's (2012) phenomenological study of self-efficacy and Latina leaders in higher education.

Summary and Conclusions

The literature review contained an exploration of the basic theories of leadership providing the foundation upon which this inquiry was built. I did not definitively answer the questions "are leaders born or made?" or "is there one-best-way to lead?" However, I found that (a) people possess varying leadership *traits* at birth, (b) leadership *behaviors* can be learned through instruction and experience, (c) leaders can *emerge* based upon the situation, and (d) the *appropriate matching or application* of a leadership style with the situation influences effectiveness.

The concepts of intersectionality, bicultural competence, and emotional intelligence have been associated with Hispanics in general and Hispanic women in particular. These concepts established a conceptual framework that was used to guide the inquiry during the data gathering, interpretative analyses, and results processes as well as providing additional context for the detailed descriptions of participants' experiences being explored.

Hispanic women business executives' self-perceptions of leadership behaviors and organizational effectiveness were explored through the conduct of this research. Factors in selecting a research design were considered and indicated a qualitative approach, a constructivism paradigm, a phenomenological strategy (i.e., methodology),

open-ended questions (i.e., method); and employing descriptive and pattern coding (i.e., methods) were appropriate for exploring the lived business experiences of Hispanic women business executives. IPA is both a strategy of inquiry (i.e., methodology) and analytical method. A detailed description of IPA and its use in this study are presented in Chapter 3 as well as a detailed description of the research method that was used in this exploratory phenomenological study.

Chapter 3: Research Method

There is little known about the lived business experiences of Hispanic women executives. For example, Hite (2007) found that most of the gender research in managerial and professional positions included White women and excluded those of other racial, ethnic, and cultural backgrounds; and Stone et al. (2006) noted the paucity of research examining the relations between cultural values and job choice preferences. In this phenomenological study, I explored the lived experiences and self-perceptions of 12 Hispanic women in business executive-level positions.

I used IPA methodology in this study and filled a gap in the literature by complementing existing work in the field concerning the occupational underrepresentation of Hispanic women. The study adds to the cumulative body of knowledge by increasing people's understanding of the lived business experiences of Hispanic women executives, as conveyed through their descriptive accounts and revealing their self-perceptions of leadership style, the ways they enact leadership, and their contributions to organizational effectiveness. Chapter 3 includes a justification for the selection of the research design relative to the purpose of the study: the exploration of lived experiences and understanding their meanings, essences, and perspectives. In this chapter, I address the research design and rationale, role of the researcher, research strategy, methods, and issues of trustworthiness.

Qualitative Research Design and Rationale

A proper research design was essential for ensuring the quality of the study. The research design included (a) philosophical paradigm, (b) strategy of inquiry (i.e.,

methodology), and (c) methods; each was important in the development of a research design that sufficiently addressed the research questions and research problem. The overarching research question for this study was: What are the lived business experiences of Hispanic women executives regarding leadership effectiveness? The following research questions provided points of concentration:

- Research Question 1: Which leadership competencies and behaviors, acquired through the lived experiences of being a Hispanic woman business executive, do the group members have in common?
- Research Question 2: What are Hispanic women business executives' perceptions of their leadership style?
- Research Question 3: What are Hispanic women business executives' perceptions of the ways they enact leadership?
- Research Question 4: What are Hispanic women business executives' perceived contributions to organizational effectiveness?

A qualitative research design was selected for this research study. Qualitative designs are appropriate when exploring and expanding understanding of peoples' lives, behavior, concepts, organizational functioning, interactional relationships, social movements, or the project is exploratory in nature where the variables and/or theory base are unknown (Creswell, 2007, 2009; Strauss & Corbin, 1990). Maxwell (2005) explained that the power of qualitative research comes from its inductive approach to reasoning, focus on experiential phenomena of people, and emphasis on nonnumeric data. Additionally, quantitative research differs from qualitative research relative to the type of

analysis performed upon the data, whereas quantitative approaches analyze data by measuring statistical differences or relationships: qualitative approaches analyze data to explore meaning-making (Gibson & Riley, 2010). Lincoln and Guba (1985) described data as the constructions provided by study participants, while analysis “leads to the reconstruction of those constructions” (p. 332).

A constructivist, or interpretivist, philosophical paradigm was employed in this study in keeping with the exploratory nature of gaining understanding of lived experience and perspectives as constructed by the researcher through interpretation of the detailed descriptions provided by the participants. The basic belief structure of a constructivism paradigm is shown in Table 10.

Table 10

Basic Belief Structure of a Constructivism Paradigm

Philosophical Issue	Belief
Ontology What is the nature of being, of reality, or of existence?	Relativist Multiple realities that are experiential and socially based.
Epistemology What is the interrelationship between what we know and what we see in the acquisition of new knowledge?	Subjectivist Cocreated understanding through the interaction between the researcher and participant.
Methodology What are the postulates, methods, and procedures employed in the process of seeking new knowledge?	Naturalistic (in the natural world) Reality constructions emerge from hermeneutic and dialectic processes.

Note. Adapted from “*Qualitative inquiry and research design: Choosing among five approaches*,” by J. W. Creswell, 2007, p. 17, Thousand Oaks, CA: Sage. Copyright 2007 by SAGE Publications, Inc.; “*Strategies of qualitative inquiry*,” by N. K. Denzin, and Y. S. Lincoln, 2003, pp. 33-35, Thousand Oaks, CA: Sage. Copyright 2003 by SAGE Publications, Inc.; “Paradigmatic controversies, contradictions, and emerging confluences, revisited,” by Y. S. Lincoln, S. A. Lynham, S. A., and E. G. Guba, 2011, In N. Denzin and S. Lincoln (Eds.), *The Sage handbook of qualitative research* (pp. 97-128), Thousand Oaks, CA: Sage. Copyright 2011 by SAGE Publications, Inc.

A phenomenological research strategy was selected that is supported by an IPA methodology. Phenomenological studies seek to reveal the world as it appears to others. This research approach is appropriate when the objective is to obtain comprehensive descriptions of shared experiences or phenomena. The aim of this research was to derive meanings and reveal the essences and underlying structures through the collection and analysis of comprehensive descriptions of experiences and perceptions (Moustakas, 1994; Trochim, 2001). Understanding the experiential world by interpreting how it was created through the social contexts, artifacts, and the meanings expressed by members of the

group are important when suggesting change in social practices or policies (Creswell, 2007; Holstein & Gubrium, 1998; Moustakas, 1994).

Other types of qualitative research were considered less appropriate due to their focus or methods used: ethnography is focused upon the study of social groups and culture, and typically included fieldwork conducted over an extended period of time. Grounded theory focuses on building substantive theory that was based upon (i.e., grounded in) the data collected. Narrative research tells a story that focuses upon a key event or biographical writing and were often portrayed as chronologies. Case study research is focused upon the unit of inquiry (i.e., case) rather than the topic of investigation and was often defined as a bounded system (Creswell, 2007; Merriam, 2009; Yin, 1994). Additionally, the absence of predefined variables and causal relationships to be analyzed precluded quantitative or mixed-method designs from consideration. A phenomenological approach was selected with the goal of increasing people's "understanding of the deeper meaning or significance of an aspect of human experience" (Van Manen, 1990, p. 62) and provided a balanced approach to obtaining the breadth and depth required for data analysis.

Role of the Researcher

The positioning of the researcher was influenced by the strategy of inquiry selected. In this subjectivist phenomenological study, the researcher was a coparticipant in a collaborative effort seeking understanding (Charmaz, 2011; Creswell, 2007; Lincoln, Lynham, & Guba, 2011). Significant roles included my participation as the primary instrument used for data collection and analysis. I conducted the face-to-face interviews,

coded the transcripts, and performed interpretative analysis. Additionally, I developed the interview questions, conducted a pilot study and revised the interview questions, and maintained a record of the research activities.

IPA involves a dual interpretative process; a double hermeneutic (Shaw, 2010; Smith & Osborn, 2008; Smith et al., 2009). The researcher, in assuming a dual role, was *like* the participant: empathic and reconstructing the experience from the participant's actual accounts, and also *unlike* the participant: questioning and interpreting experiential meaning perceptions using a theoretical or experientially-informed lens. As coconstructors of understanding the meaning of lived experiences or phenomena, the perspectives of participants and myself were meaningful in interpretation and results. The keys to interpretive inquiry were listening, openness, receptivity, empathy, honesty, and mutual respect.

My cultural position was influenced by an upbringing in predominately White/Judeo-Christian communities of the Northeastern and Midwestern United States. For the last 10 years, I've been living in predominately Hispanic South Florida. I must be cautious of potential bias although the dual-culture lived experience may be beneficial in the construction of understanding in a multicultural environment.

Methodology

I used IPA in this qualitative, exploratory, phenomenological research study. IPA is informed by the concepts of phenomenology, hermeneutics, and idiography (Smith et al., 2009). The idiographic nature of IPA studies, the commitment to the detailed examination of each participant's experience, was reflected in depth and breadth of

analysis of a relatively few and homogenous sample. This chapter includes the pilot study, procedures and criteria for participant selection and recruitment, instrumentation, data collection, data analysis, trustworthiness, and ethical procedures.

Pilot Study

Maxwell (2005) and Seidman (2006) explained how a small-scale pilot study could benefit the research project. The pilot might reveal issues with participant recruitment and selection, interviewing techniques that might detract from the study's objectives, or indicate that interview questions might need revision. I conducted a pilot study to test and refine the interview instrument that I developed, to help assure the instructions, interview questions, or both were clear and understandable.

I complied with the requirements of the Walden University Institutional Review Board (IRB), and contact was not made with potential volunteers until approval was obtained from the IRB. Walden University's approval number for this study was 01-07-14-0023318. Three Hispanic women business executives meeting the criteria for participant selection were chosen to participate in the pilot study using procedures for recruitment and participation that mirrored the final study, and with consideration given to "convenience, access, and geographic proximity" (e.g., Creswell, 2007, p. 133).

The pilot study involved an audio recorded face-to-face interview with each participant, which included time to discuss interview question concepts, phrasing, sequencing, and other recommendations. Revisions to the interview protocol were based upon an analysis of the detailed responses to interview questions, participants' recommendations, and suggestions from the dissertation committee. The changes to the

final study, based upon the findings of the pilot study, were approved by the IRB prior to their implementation by submitting a Request for Change in Procedures Form along with the supporting documents effected by those changes.

Procedures for Recruitment and Participation

Upon approval from the Walden University IRB to conduct the dissertation research, the sample selection process supplied the participants for the study. I defined the study population as Hispanic women business executives located in the southeastern region of the United States. The sampling frame included participants obtained by emailing the Chief Executive Officer (CEO)/Owner or equivalent (i.e., authorizing representative) from Fortune 1000, Hispanic Business 500, and other private companies located in the southeastern region of the United States, or directly via snowball sampling. A sample copy of the “Letter Requesting Assistance Identifying Participants for a Study” that was sent to the Chief Executive Officer (CEO)/Owner or equivalent (i.e., authorizing representatives) is included in Appendix A. A sample copy of the “Letter of Invitation to Participate in a Study” that all potential participants received is included in Appendix B. The volunteers that I selected met the criteria for participant selection, were willing to commit the time to the study, and granted permission to record interviews and publish the data in a dissertation and other publications. I also emphasized the participants could withdraw at any time up until the completion of the dissertation.

I used a purposive sampling method to select a homogeneous group of participants that shared attributes relevant to the study. The participants were required to meet certain criteria that would support expectations for information content, quality

assurance, and analysis of convergent and divergent patterns (Merriam, 2009; Miles & Huberman, 1994; Patton, 2002; Preissle & LeCompte, 1984; Smith et al., 2009). The criteria for participant selection were:

- Study participants were self-identified Hispanic women.
- Participants possessed 5 or more years of experience performing business executive-level functions.
- Participants' experience requirements were fulfilled in companies where they did not have a controlling ownership interest.
- Participants were located in the southeastern region of the United States during the conduct of the study.

The sample size in qualitative studies should be adequate to answer the research questions (Merriam, 2009). Polkinghorne (1989) explained the sample size varied considerably for phenomenologically based studies, citing studies with as few as three participants and as many as 325. Lincoln and Guba (1985) recommended that sampling should continue to the point where the information obtained from additional sampling adds nothing further, to the point of redundancy; while Patton (2002) suggested specifying minimum samples that were expected to satisfy the requirements of the study and would be increased if needed. Sufficiency in an IPA study is influenced by the depth and richness of the detailed descriptions provided by the participants.

In addition, each case (i.e., individual participant's transcripts) must be fully analyzed before moving to the next case and before analyses between cases, resulting in small samples for IPA studies (Shaw, 2010). A small IPA sample would include one to

three participants, a medium IPA sample four to eight participants, and a large IPA sample more than eight participants (Smith, 2011). Smith et al. (2009) suggested that a sample size of three to six participants provided a sufficient number of cases to develop “meaningful points of similarity and difference” (p. 51) between the various accounts of experience while not becoming unwieldy.

Once I made contact with a potential participant, I sent a Consent Form (Appendix C) by email to the participant. Returned consent forms were confirmed when I scheduled the face-to-face interview using email and by telephone. This process was repeated until the final sample size of 12 participants was obtained. In the case of a withdrawal, the participant’s information would be excluded from any part of the data collection, analysis, and results processes. I would obtain a replacement participant using similar procedures for recruitment and participation.

Data Collection

Companies located in the southeastern region of the United States were selected from Fortune 1000, Hispanic Business 500, and other company listings and their contact information was compiled. Authorizing representatives received a “Letter Requesting Assistance Identifying Participants for a Study” (Appendix A) by U.S. mail or email, upon which they did forward a “Letter of Invitation to Participate in a Study” (Appendix B) to potential participants. Positive responses were provided a “Consent Form” (Appendix C) in a separate email from the researcher. Potential participants identified through snowball sampling received the “Letter of Invitation to Participate in a Study”

(Appendix B) and the “Consent Form” (Appendix C) directly from the researcher in a single email.

Returned consent forms were confirmed when I scheduled the face-to-face interview using email and by telephone. This process was repeated until the required sample size of 12 participants was obtained. I scheduled the face-to-face interview sessions to be conducted over the subsequent weeks that accommodate the schedules of the participants. Additionally, the final sample included only one volunteer from each company affording them a conflict-of-interest free interview experience and confidentiality.

A variation of the three-interview series model (Schuman, 1982) (as cited in Seidman, 2006) was used in this study facilitating the development of context, which included a single three-phase interview with each participant. The interview was audio recorded and supplemented with written notes providing contextualization. Each phase in the interview had a unique orientation:

- Phase 1: explored the lived business experiences of being a Hispanic women executive.
- Phase 2: explored their self-perceptions of leadership style and how they enact leadership.
- Phase 3: explored self-perceptions of their contributions to organizational effectiveness.

A sample copy of the interview guide is included in Appendix F. Table 11 shows the relationship between the research questions and interview questions.

Table 11

Research Question to Interview Question Mapping

Overarching Research Question: What are the lived business experiences of Hispanic women executives regarding leadership effectiveness?	
Research Questions	Interview Questions
Which leadership competencies and behaviors, acquired through the lived experiences of being a Hispanic woman business executive, do the group members have in common?	1a., 1b., 1c., 2a., 2b., 2c., 2d., 2e., 3a., 3b., 3c., 3d., 3e., 4a., 4b., 4d., 4e., 4f.,
What are Hispanic women business executives' perceptions of their leadership style?	5a., 5b., 5c., 5d., 7a., 7b., 9., 10., 11.,
What are Hispanic women business executives' perceptions of the ways that they enact leadership?	4c., 6a., 6b., 6c., 6d., 7c., 8., 12., 13.,
What are Hispanic women business executives' perceived contributions to organizational effectiveness?	14a., 14b., 14c., 14d., 14e., 14f., 15a., 15b., 15c., 15d., 16., 17., 18., 19., 20., 21., 22., 23., 24., 25., 26.

Note. Interview questions are included in Appendix F.

The interviews were audio recorded and then transcribed verbatim using a laptop computer and transcription software. The purpose, of using IPA, was to interpret the meaning of the detailed textual descriptions: It was the content of the transcriptions that were important. IPA also required that all of the words spoken by everyone present at the interview be included in the transcriptions (i.e., a semantic record of the interview) and might include notations of laughter or significant pauses; however, the use of IPA did not require the transcriptions to include all of the prosodic aspects of the interviews (i.e., the exact length of pauses, coughs, sighs, interruptions, telephone rings, outside noises, etc.)

that might be required in other types of discourse and conversation analysis (Shaw, 2010; Smith et al., 2009).

The transcripts were coded using NVivo 10 by QSR International software, which also supported the management of research data and the interpretative analysis processes. The data was kept secure by using password protected files and will be retained for a period of at least 5 years as required by the university.

Data Analysis

This section focused upon data processing, analysis, and interpretation. IPA studies are conducted on small sample sizes, and analysis of the detailed transcripts of each case is time consuming (Smith & Osborn, 2008). IPA is not prescriptive in its methodology, its flexibility allows the researcher a certain degree of freedom in designing the study to meet the needs of the research project. Giorgi (2010) was critical of IPA and its lack of prescriptive measures; however, IPA assures quality by adhering to an auditable and systematic process conducted rigorously (Pringle, Drummond, McLafferty, & Hendry, 2011; Smith, 2011). Although IPA may not follow Giorgi's definition of a prescriptive methodology, there exists a step-by-step process to be followed that advances the commitments to phenomenology, hermeneutics, and idiography.

The interviews were audio recorded then transcribed using Dragon Naturally Speaking software and a Mac computer. I used NVivo 10 software in support of the coding, analysis, and presentation of the data. I kept a reflective diary to note my ideas and any occurrences during data analysis and supporting an adequate audit trail (Shaw,

2010). Figure 17 outlines the procedural steps that I used in data analysis (Shaw, 2010; Smith et al., 2009).

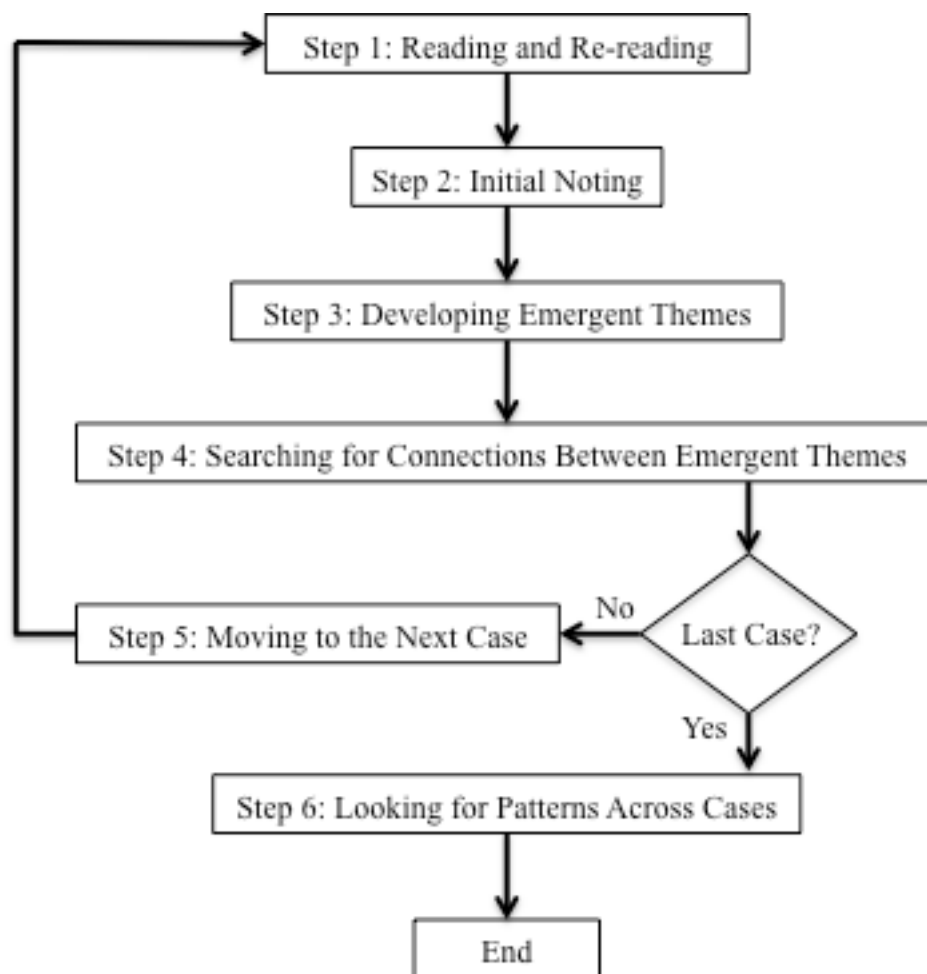


Figure 17. Interpretative phenomenological analysis (IPA) data analysis flowchart. Adapted from “QM3: Interpretative phenomenological analysis,” by R. Shaw, 2010, In M. Forrester (Ed.), *Doing qualitative research in psychology: A practical guide* (pp. 177-201). Thousand Oaks, CA: Sage. Copyright 2010 by Rachel Shaw; “*Interpretative phenomenological analysis: Theory, method and research*,” by J. A. Smith, P. Flowers, and M. Larkin, 2009, pp. 80-106, Los Angeles, CA: Sage. Copyright 2009 by Jonathan A. Smith, Paul Flowers and Michael Larkin.

Step 1: Reading and re-reading. To facilitate formatting, printing, and reading the transcript was imported into Microsoft Word. It was important that I became familiar

with the data; that I became actively engaged with it and made the participant the focus of analysis. Transcribing the audio recording brought the interview back to the forefront and began the process of entering the participant's world. Re-reading also revealed the locations of rich and detailed sections of the transcript (Smith et al., 2009).

Step 2: Initial noting. To begin the coding process the transcript, in the form of a Word document, was imported into NVivo 10. As the transcript was reviewed line-by-line, this would be the most detailed and time-consuming level of the analysis. The process of exploratory commenting included (a) writing descriptive comments and (b) making initial interpretations. *Descriptive coding* and *NVivo coding* first-cycle coding methods (i.e., Table 9) were to be used to build a foundation for subsequent coding cycles (Saldaña, 2009). I analyze each line of text, coding descriptive comments that reflected what mattered to the participant, which are revealed through the participant's language, emotional responses, and other keys that uncover the participant's thoughts and feelings. Descriptive comments that help identify initial themes include (a) short phrases taken directly from the text and (b) short, descriptive summaries of the text or concepts.

Making initial interpretations involved taking a more interrogative position by asking questions about the descriptive comments; reanalyzing the data, and reflecting upon what the descriptive comments might mean. Some questions led nowhere; some led back to the data, and some led to abstraction (Smith et al., 2009). My thoughts, experiences, and feelings were a part of the engagement of interpretation; however, the focus of the analysis remained on the participant's experience and self-perceptions. The initial interpretations *must* be evidenced in the data. The audit trail provides a tool that

ensures my (i.e., the analyst's) interpretations were based upon the data (Shaw, 2010).

Figure 18 illustrates a simple audit trail.



Figure 18. Simple audit trail: Initial noting of data analysis. Audit trail is showing the linkage between raw data and initial interpretation. Adapted from “QM3: Interpretative phenomenological analysis,” by R. Shaw, 2010, In M. Forrester (Ed.), *Doing qualitative research in psychology: A practical guide* (p. 194). Thousand Oaks, CA: Sage. Copyright 2010 by Rachel Shaw.

Step 3: Developing emergent themes. Analyzing exploratory comments (i.e., descriptive comments and initial interpretations) to identify emergent themes required the focus of analysis shifted away from the interview transcript. This stage of analysis looked for connections, interrelationships, and patterns between the descriptive comments and initial themes to further reduce the data (Shaw, 2010; Smith et al., 2009). This progression towards data reduction illustrates the importance of a comprehensive initial noting and the linkage between the raw data and exploratory comments.

Pattern coding was used as the second-cycle coding method (i.e., Table 9) to organize similarly coded data (Saldaña, 2009). Clusters of exploratory comments representing emergent themes were identified. An emergent theme was a concise statement developed from various exploratory comments linked to the passage of text that reflected an important aspect or essence that was unique and conceptual. In keeping with the concept of a hermeneutic circle, care was exercised to interpret each part of the transcript in relation to the whole, and to interpret the whole transcript in relation to the

parts (Smith et al., 2009). Shaw (2010) also suggested the research questions and research problem, “the end result” (p. 197), should be kept in mind during this stage of analysis.

Step 4: Searching for connections between emergent themes. This step involved establishing superordinate themes, which was the drawing together of themes that point to the most interesting and important aspects of the participant’s experiential account and self-perceptions (Shaw, 2010; Smith et al., 2009). Not all themes were included in the set of themes reported in the results section of this research report. Smith et al. (2009) suggested the following methods for developing superordinate themes in an IPA study, reiterating however these were not meant to be prescriptive and did not exclude other methods of looking for relationships between themes:

- *Abstraction*: Combining like emergent themes and “developing a new name for the cluster” (p. 96)—the superordinate theme.
- *Subsumption*: Raising an emergent theme to superordinate theme status and bringing related emergent themes into that cluster.
- *Polarization*: Focusing on differences between emergent themes looking for oppositional relationships.
- *Contextualization*: Looking for connections between emergent themes that surround an experiential moment, an important event or self-perception.
- *Numeration*: The frequency in which an emergent theme is supported.
- *Function*: Examining the way in which an emergent theme is used within the context of the transcript; for example, whether the emergent theme reflects a positive or negative connotation.

Step 5: Moving to the next case. In keeping with the IPA idiographic commitment, each participant's experiential accounts and self-perceptions was afforded individual analysis within the framework of the study. I bracketed the ideas that emerged from previous cases to the extent possible; however, IPA was designed to incorporate the possibility that my fore-structures had changed (Smith et al., 2009). The idiographic nature and systematic approach to IPA ensured that each case was treated on its terms while allowing new themes to emerge.

Step 6: Looking for patterns across cases. This stage involved looking for patterns and connections across the cases. The analysis became more theoretical as superordinate themes uniquely presented in particular cases revealed convergent and divergent relationships when compared across higher order concepts leading to a "reconfiguring and relabeling of themes" (Smith et al., 2009, p. 101) or final themes. Table 13 in the results section presents the final table of themes for the group.

Issues of Trustworthiness

Maxwell (2005) referred to validity as the "correctness or credibility of a description, conclusion, explanation, interpretation, or other sort of account" (p. 106). The reference did not imply a requirement of objective truth or present any philosophical challenge, although it did provide some basis for determining which accounts were considered credible versus those that were not credible. Two approaches to increasing the quality and trustworthiness of the research study are (a) guarding against specific threats to validity, and (b) demonstrating the validity of the qualitative research.

Confirmability

Researcher bias and reactivity are two broad types of threats to validity in qualitative research (Maxwell, 2005). Researcher bias results from the selection of data that matches the researcher's preconceptions or fits existing theory and the selection of data that are prominent, conspicuous, or avoids negative consequences. The process of data selection in qualitative research is accepted as a subjective process that potentially influences the conduct and conclusions of the study precluding the elimination of the researcher's experiential knowledge, values, and perceptual lens from the study.

Reactivity is the effect of the researcher on the setting or the participant and is also unavoidable. There exists the possibility not only that the researcher influences the participant, but also that the participant influences the researcher (Miles & Huberman, 1994). In an interview situation, the setting and the researcher always influence how the participant responds; the objective will not be to eliminate that influence but to use it in a productive manner (Maxwell, 2005).

Qualitative research accepts that the study will be influenced by the researcher (Yardley, 2008). It will be my responsibility to explain possible bias, how I might be influencing participant responses, and the inferences drawn from those responses. Reflexivity was used to identify possible bias and reactivity during the research activities, and were addressed in the relevant sections of the study.

Credibility

Methods used in this IPA study included demonstrating a *sensitivity to context* through the careful selection of a purposive sample, the interactional nature of face-to-

face interviews, the appreciation of the participant's willingness to share their experience and self-perceptions, the attention required in the analysis of the participant's sensemaking, and an awareness of existing literature. Sensitivity to the data is the most significant context an IPA study is sensitive as any inferences made must be grounded in the data obtained (Yardley, 2008).

Coherence refers to what extent the various aspects of the study make sense as a whole (Yardley, 2008). It depends upon the fit between the theoretical approach, research questions, methods used, and data interpretation. Coherency was evidenced by the phenomenological, hermeneutic, and idiographic underpinnings of IPA methodology aligned with the research problem and interpretative analysis that answers the research questions.

Member checking was performed during the conduct of the research to help assure the validity of the study. The completed results analysis was provided by email to all participants for their feedback on the representativeness of interpreted themes and inferences made, with their comments being incorporated into the final report (Maxwell, 2005; Merriam, 2009).

Dependability

Dependability infers that the research was conducted with reasonable care. *Commitment* and *rigour* were demonstrated by obtaining the appropriate sample, showing attentiveness during the interview process, and thoroughly performing analysis. A good interview requires commitment while rigour was evidenced by the systematic analysis and idiographic engagement that are characteristic of an IPA study. Additionally, the

participants were portrayed individually, collectively, and with sufficient interpretation (Smith et al., 2009; Yardley, 2008).

Qualitative research software can improve the management and control over the research process (Creswell, 2007). I used NVivo 10 by QSR International software to store and manage the research data, support various types of coding, and facilitate single case and across case analysis. Additional benefits included robust audit trail support (i.e., linking interpretive themes to the data), and data presentation capabilities.

Transferability

Lincoln and Guba (1985) explained transferability requires that the “burden of proof” (p. 298) rests with the researcher making the application elsewhere. The original researcher is responsible for providing enough data to make transferability judgments possible by others; however, the responsibility ends with “providing sufficient descriptive data to make such similarity judgments possible” (p. 298). Selection effects, setting effects, history effects, and construct effects were not considered threats but as points of consideration when making judgments of transferability.

Transparency was advanced by providing enough details so the reader can follow exactly what was done and why, and audit trails could be provided to show upon which data the analytic interpretations were based (Yardley, 2008). Additionally, a *reflective diary* was kept that includes notes regarding the initial topic, defining the research questions, participant selection, collecting data, reading transcripts, performing analysis, and the final write-up (Shaw, 2010).

Ethical Procedures

A consent form for adults was submitted as part of the research ethics review application to the Walden University Institutional Review Board (IRB) requesting approval to conduct research. Approval to conduct the research was obtained from the IRB before any contact with potential participants or data collection activity. A sample copy of the “Consent Form” for adults is included in Appendix C.

Summary

The purpose of Chapter 3 was to review the proposed research methods to be used in the conduct of this study. Presented was the rationale for choosing a qualitative phenomenological design to answer the research questions. Also presented were detailed descriptions of the participant selection process, data collection using face-to-face interviews, analysis using IPA methodology, and procedures that assured trustworthiness.

In Chapter 4, I review the actual procedures used in the conduct of the study, which includes descriptions of the pilot study, research setting, demographic data collected, data collection process, data analysis, and evidence of trustworthiness. Deviations from proposed procedures are explained. Also presented are the results of the study with a brief summary.

Chapter 4: Results

The purpose of this phenomenological study was to explore the lived business experiences of Hispanic women in executive-level positions located in the southeastern region of the United States. This chapter includes a presentation and analysis of the rich, and detailed descriptions of each participant's lived experiences and self-perceptions obtained through semistructured interviews. I used IPA methodology to organize, code, analyze and present the data. (Smith et al., 2009; Smith & Osborn, 2008). The research questions were:

- Research Question 1: Which leadership competencies and behaviors, acquired through the lived experiences of being a Hispanic woman business executive, do the group members have in common?
- Research Question 2: What are Hispanic women business executives' perceptions of their leadership style?
- Research Question 3: What are Hispanic women business executives' perceptions of the ways they enact leadership?
- Research Question 4: What are Hispanic women business executives' perceived contributions to organizational effectiveness?

The study fills a gap in the literature by complementing existing work in the field concerning the occupational underrepresentation of Hispanic women, and provides insight into factors of leadership based upon their lived experiences. Chapter 4 contains a description of the pilot study, participant selection procedures, demographics related to

the study, data collection, analysis and presentation of the data, evidence of trustworthiness, and a summary of the results.

Pilot Study

Maxwell (2005) and Seidman (2006) explained how a small-scale pilot study could benefit the research project. A pilot study was conducted to test and refine the interview instrument that I developed, to help assure the instructions, interview questions, or both were clear and understandable. I complied with the requirements of the Walden University Institutional Review Board (IRB), and my Notification of Approval to Conduct Research was received on 1/7/14, prior to contacting potential volunteers. Three Hispanic women business executives were chosen to participate in the pilot study using procedures for recruitment and participation that were approved by the IRB. Two participants were obtained by direct mailing, and one was obtained through personal knowledge. The pilot study involved an audio recorded face-to-face interview with each participant, which included time to discuss the interview question concepts, phrasing, sequencing, and other recommendations.

My revisions to the interview protocol were based upon an analysis of the detailed responses to interview questions, participants' recommendations, and suggestions from the dissertation committee. A Request for Change in Procedures Form, along with the supporting documents effected by these changes, were submitted to the IRB on 3/13/14. Approval to implement changes to the final study was received from the IRB on 3/18/14.

Research Setting

I maintained a professional posture in the research setting (i.e., interview space). The interviews were conducted at the participants' workplace or similar business surrounding. During the 2 hour face-to-face interviews, the participants' were engaged and focused upon the interview questions; however, there were occasions when interruptions occurred, and the interview would pause momentarily. These work-related interruptions were limited, and the effects were minimal. Alternatively, I was not at my best on two occasions when I was ill and I feel that may have been a distraction in two ways: (a) the participants might have been concerned about the risk of becoming ill themselves and rushed the interview, and (b) my conduct of the interview may have been less effective. I performed the transcribing, coding, and analyses of the data in a dedicated office space that was private and secure, to minimize distraction and risk to participant information.

Demographic Data

I obtained demographic data of the study participants using a Confidential Demographic Survey (Appendix D). The surveys were completed by the participants at the beginning of their face-to-face interviews. Table 12 shows the demographic data collected from the study participants.

Table 12

Demographic Data of Study Participants

Participant	1	2	3	4	5	6
Work hours per week	40+	55	55	24/7	60+	50
Years in current position	14	8	1	1	10	8
# of direct reports	3	5	2	12	5	7
# of people in organization	4	38	3	22	17	500+
Business function	Finance: Banking: Commercial Lending	Human Resources	Marketing	Marketing: Planning	Sponsorship	Human Resources: Work Force Planning
Number of executive positions held (lifetime)	1	2	3	6	2	4
Years as executive (lifetime)	5	11	12	20	8	22
Leadership skill/style assessment	Never	4 to 7 Yrs.	0 to 3 Yrs.	4 to 7 Yrs.	> 7 Yrs.	0 to 3 Yrs.
Company (current)	Fortune 1000: Multi- national	Domestic: Multi- national	Fortune 1000: Multi- national	Fortune 500	Non-profit	Other Publicly Held
Do you enjoy your work	Yes	Yes	Yes	Yes	Yes	Yes
Do you feel secure in employment	Yes	Yes	Yes	No	Yes	Yes

(table continues)

Participant	7	8	9	10	11	12
Work hours per week	65	60	50	50	40+	45
Years in current position	5	3	10	7	17	6
# of direct reports	3	8	6	14	5	3
# of people in organization	500+	150	180	15	32	14
Business function	Travel Distribution Systems	Marketing	Education	Strategic Health Planning	Regulatory Affairs and Compliance	Finance: Treasury
Number of executive positions held (lifetime)	3	3	3	2	6	2
Years as executive (lifetime)	20	5	23	17	23	7
Leadership skill/style assessment	0 to 3 Yrs.	0 to 3 Yrs.	4 to 7 Yrs.	Never	> 7 Yrs.	0 to 3 Yrs.
Company (current)	Other Publicly Held: Multi-national	Fortune 1000	Private	Other Publicly Held	Private	Fortune 1000
Do you enjoy your work	Yes	Yes	Yes	Yes	Yes	Yes
Do you feel secure in employment	Yes	Not Sure	Yes	Yes: Most of the time	No	Yes

Note. From Confidential Demographic Survey (Appendix D).

Data Collection

Upon approval from the Walden University IRB, I conducted the dissertation research. The sample selection process supplied the participants for the study. The study

population was defined as Hispanic women business executives located in the southeastern region of the United States. The southeastern region of the United States included: Alabama, Arkansas, Florida, Georgia, Kentucky, Louisiana, Mississippi, North Carolina, South Carolina, Tennessee, Virginia, West Virginia, District of Columbia, Eastern Texas, and Puerto Rico.

I used a purposive sampling method to select a homogeneous group of participants that shared attributes relevant to the study. The participants met certain criteria that would support expectations for information content, quality assurance, and analysis of convergent and divergent patterns (Merriam, 2009; Miles & Huberman, 1994; Patton, 2002; Preissle & LeCompte, 1984; Smith et al., 2009). The criteria for participant selection was:

- Study participants were self-identified Hispanic women.
- Participants possessed 5 or more years of experience performing business executive-level functions.
- Participants' experience requirements were fulfilled in companies where they did not have a controlling ownership interest.
- Participants were located in the southeastern region of the United States during the conduct of the study.

The procedures for recruitment and participation that I described in Chapter 3 did not supply enough participants to obtain the required sample. Many of the responses received from targeted companies explained they did not participate in surveys as a matter of policy, which precluded the authorizing representatives from forwarding the

Letter of Invitation to Participate in a Study to their Hispanic women executives. To supplement the process, I expanded the use of networking opportunities to meet and invite Hispanic women business executives to volunteer for the study.

The required sample size of 12 participants was obtained by (a) attending community business networking events, (b) attending collegiate networking events, (c) snowball sampling and (d) by referral. Once the contact was made with a potential participant, a Consent Form (Appendix C) was sent by email to the participant. Returned consent forms were confirmed when I scheduled the face-to-face interview using email and by telephone. This process was repeated until the final sample size of 12 participants was obtained.

The volunteers who I selected met the criteria for participant selection, were willing to commit the time to the study, and granted permission to record interviews and publish the data in a dissertation and other publications. I also emphasized that the participants could withdraw at any time up until the completion of the dissertation. In the case of a withdrawal, the participant's information would be excluded from any part of the data collection, analysis, and results processes. I would obtain a replacement participant using similar procedures for recruitment and participation. Over a 5 month period, I conducted audio recorded face-to-face semistructured interviews using an interview guide (Appendix F), in mutually agreed upon settings that were free from distraction. Nine interviews were conducted in the participants' workplace offices: two interviews were conducted in Regus offices provided by me, and one was conducted in

the participant's home office. Every effort was made to accommodate the participants' schedule and location requirements.

Data Analysis

The data analysis process focused upon data processing, analysis, and presentation. I used IPA to support data analysis. IPA is not prescriptive in its methodology; its flexibility allowed me a certain degree of freedom in designing the study to meet the needs of the research project. Giorgi (2010) was critical of IPA and its lack of prescriptive measures, however IPA assures quality by adhering to an auditable and systematic process conducted rigorously (Pringle et al., 2011; Smith, 2011). Although IPA may not follow Giorgi's definition of a prescriptive methodology, there exists a step-by-step process that advances the commitments to phenomenology, hermeneutics, and idiography.

While transcribing the audio recorded interviews, it became apparent that a predefined thematic structure existed naturally by virtue of the conceptual framework of the study and semistructured interview guide. Structural coding is content-based or concept-based and appropriate for studies "using structured or semistructured interview or focus group guides" (Namey, Guest, Thairu, & Johnson, 2008, p. 140) or "employing multiple participants, standardized or semi-structured data-gathering protocols, hypothesis testing, or exploratory investigations" (Saldaña, 2009, pp. 66-67). MacQueen, McLellan-Lemal, Bartholow, and Milstein (2008) explained the use of structural coding simplified subsequent data analysis by identifying all of the text associated with particular questions or concepts.

Structural coding and *Descriptive coding* were used as first-cycle coding methods (i.e., Table 9). For each transcript, structural coding was employed to align the participant's responses within the framework of the study. Secondly, descriptive coding was used to build a foundation for subsequent coding cycles (Saldaña, 2009). I analyzed each line of text coding descriptive comments that reflected what mattered to the participant, which was revealed through the participant's language, emotional responses, and other keys that uncovered the participant's thoughts and feelings.

The conceptual framework and semistructured interview guide provided an initial coding structure and a set of predefined themes. I developed a thematic mapping using the predefined themes during the set-up of the project in NVivo 10, and was updated for emergent themes during the coding and analysis processes. A detailed coding and thematic mapping for the group is included in Appendix G. The data reduction process and identification of the most interesting or important themes yielded the final table of themes for the group as shown in Table 13.

Table 13

Final Table Of Themes For The Group

Theme	Subtheme
Lived experience and acquired competencies	Early lived experiences with diversity Cultural setting at home and work Becoming/Being an executive: Effect on personal life Role of intentionality and serendipity Differences in treatment Acquired competencies as factors in business executive effectiveness
Leadership and leadership effectiveness	Self-perceptions of leadership style Achieving effective outcomes: Best way to lead Models used in leadership or decision making Self-perceptions of leadership behavior (enactment) Self-efficacy and success as a leader Contributing factors in leadership effectiveness
Organizational effectiveness	Perceptions of company culture Effects of the company's perceptions (assumptions) of Hispanic women's leadership behaviors Perceived contributions to organizational effectiveness Contributing factors in organizational effectiveness

Note. Table 13 includes predefined themes and emergent themes.

Evidence of Trustworthiness

Confirmability

Reflexivity was used to identify possible bias and reactivity during the research activities. Researcher bias was minimized by including the responses of all participants in each data presentation, when feasible. Completeness of the data in the presentation of themes reduced the potential for researcher bias.

Reactivity is the effect of the researcher on the setting or the participant and was also unavoidable. Every effort was made to accommodate the participants' schedule and

location requirements. Possible reactivity occurred due to (a) work-related interruptions during the interviews although few, (b) a reluctance to be completely candid for concern of coworkers overhearing the participant's responses to questions, and (c) a reluctance to be completely candid being interviewed by a non-Hispanic male.

Credibility

A sensitivity to context was demonstrated through the careful selection of a purposive sample, the interactional nature of face-to-face interviews, the appreciation of the participant's willingness to share their experience and self-perceptions, the attention required in the analysis of the participant's sensemaking, and an awareness of existing literature. Any inferences made in this study were grounded in the data obtained from the participants (Yardley, 2008).

Coherence refers to what extent the various aspects of the study make sense as a whole (Yardley, 2008). It depends upon the fit between the theoretical approach, research questions, methods used, and data interpretations. Coherency was evidenced by the phenomenological, hermeneutic, and idiographic underpinnings of IPA methodology aligned with the research problem and interpretative analysis that answered the research questions.

Member checking was performed during the conduct of the research to assure the validity of the study. After completion of the initial coding and categorization of the transcribed data (i.e., first-cycle coding), the results were provided by email to all participants for their feedback on the representativeness of their interview transcription, the detailed coding and thematic mapping, and initial inferences made. All of the returned

responses (i.e., 10 of 12) were positive. Two changes were requested: one to remove identifying information of a coworker from a transcript passage, and one correction to the list of countries where a participant had lived.

Dependability

I conducted the research with reasonable care. Commitment and rigour were demonstrated by obtaining the appropriate sample, showing attentiveness during the interview process, and thoroughly performing analysis. The interviews required commitment and rigour was evidenced by the systematic analysis and idiographic engagement that are characteristic of an IPA study. Additionally, the participants were portrayed individually, collectively, and with sufficient interpretation (Smith et al., 2009; Yardley, 2008).

I used NVivo 10 by QSR International software to store and manage the research data, support various types of coding, and facilitate single case and across-case analysis. Appendix G contains a detailed coding and thematic mapping for the group. Additionally, NVivo 10 supports a robust audit trail (i.e., linking interpretive themes to the data).

Transferability

The sampling method used (i.e., purposive sampling) limits the generalizability of the results beyond the study group. Transferability may be affected by the small sample size and the sample being selected from one specific region of the United States out of several possible regions. I provided enough information for transferability judgements to be made by others. Lincoln and Guba (1985) explained that transferability required that the “burden of proof” (p. 298) rested with the researcher making the application

elsewhere. The original researcher was responsible for providing enough data to make transferability judgments possible by others; however the responsibility ended with “providing sufficient descriptive data to make such similarity judgments possible” (p. 298). Selection effects, setting effects, history effects, and construct effects were not considered threats but as points of consideration when making judgments of transferability.

Transparency was advanced by providing enough details so the reader can follow exactly what was done and why, and audit trails could be provided to show upon which data the analytic interpretations were based (Yardley, 2008). Additionally, a reflective diary was kept that included notes regarding the initial topic, defining the research questions, participant selection, collecting data, reading transcripts, performing analysis, and the final write-up (Shaw, 2010).

Study Results

Presented are the experiences, perceptions and feelings of the study participants in the order of the themes shown in Table 13. The overarching research question for this study was: What are the lived business experiences of Hispanic women executives regarding leadership effectiveness? Tables were used to present the participants’ responses in most cases. Discrepant responses are highlighted and explained in the table notes when they occur.

Lived Experience And Acquired Competencies

The participants experienced diversity as they lived in various U.S. cities and countries during childhood and into adulthood. This variety of experience provided a

foundation for the recognition, acceptance, and understanding that people and cultures have many differences. These experiences in diversity imparted a wider view of the world and enhanced their interpersonal relationships.

Early lived experiences with diversity. The U.S. cities and countries listed in Table 14, where the participants have lived, demonstrates their contact with various people and cultures.

Table 14

Lived Experience-Places Where You Have Lived

Participant	Years In U.S.	U.S. Cities/States	Non-U.S. Cities/Countries
Participant 1	7	South Florida	Puerto Rico
Participant 2	44	Green Bay WI; Pittsburgh PA; South Florida	Cuba
Participant 3	21	Miami Beach; SouthFlorida	Philippines; Madrid, Spain
Participant 4	52	New York NY; Brooklyn NY; Michigan; New Jersey; Texas; South Florida	Puerto Rico; Mexico; Spain; Brazil; Argentina; Venezuela
Participant 5	48	Washington D.C.; New York NY; Scottsdale AZ; South Florida	Peru; Argentina; Santiago Chile; Cuba
Participant 6	46	New York NY; Vermont; New Hampshire; South Florida	Cuba; Spain
Participant 7	47	Southern Louisiana; Texas; South Florida	Latin America; Venezuela
Participant 8	14	Tampa FL; Denver CO; Chicago IL; Northeast Texas	Puerto Rico
Participant 9	30	SouthFlorida	Cuba
Participant 10	53	San Diego CA; Bronx NY; South Florida	Puerto Rico
Participant 11	47	New York NY; South Florida	
Participant 12	14	Chicago IL; Minneapolis MN; Atlanta GA	Mexico

Note. Participant 11 lived in the United States her entire life.

Cultural setting at home and work. Table 15 shows the participants' perceptions of their cultural setting at home and work, continuing their demonstration of living with diversity.

Table 15

Cultural Setting At Home And Work

Cultural Setting	Participant	
	Home	Work
Hispanic	1, 4, 11, 12	
Mostly Hispanic	7	7
Non-Hispanic	2, 10	11, 12
Mixed	3, 5, 6, 8, 9	1, 2, 3, 4, 5, 6, 8, 9, 10

Note. Mixed includes Hispanic and Non-Hispanic.

Becoming/Being an executive: Effect on personal life. Becoming and being an executive required dedication and sacrifice from the participants and their families. Changing roles and responsibilities made it difficult to balance work life and personal life. Most of the participants were able to achieve a perceived work-life balance while three participants found it more difficult as shown in Table 16.

Table 16

Effect On Personal Life

Achieved Work-Life Balance	Participant
Yes	1, 2, 4, 6, 7, 8, 10, 11, 12
No	3, 5, 9

Note. Nine of the participants achieved work-life balance while three of the participants could not.

Changing relationships and responsibilities affected the personal lives of the participants; albeit some adjustments were more difficult than others. The following excerpts describe their perceptions of work-life balance and select solutions for achieving it. Participant 6 said, “I think that’s the thing that, as you get higher in an organization in a much higher position, how do you balance that time, and it’s always a challenge. I think

any leader in any executive position.” Participant 12 explained, “I don’t see it as a consequence of me getting more responsibility. I think the dynamics, in general, in my house, have changed throughout my whole professional career that has been a little bit of a multifactor effect.” According to Participant 2:

Well that is also a very interesting point, and I’m going to say what has helped me be very successful in my career progression, to me, is the fact that my husband; we do not have children so; we were not fortunate enough to have children...personally my life the changes went along but I had the full support at home if you don’t have the full support it just doesn’t feel right—I’m very lucky.

Participant 7 decided that, “I did not want to be in technology anymore, because my daughter was getting to an age—again the balance of life; it doesn’t have to be a bad choice; it’s just a choice that we can make.” According to Participant 11:

I think for many years my job defined who I was, in terms of, I mean that’s all I did. I just worked around the clock, but I enjoyed it...So now it’s become; this is so cliché: let me find a balance; let me find a balance of doing the work; being successful; stay on top of all the work; and then also having this family life; a very fruitful family life where we all enjoy each other; and they are happy.

Participant 10 said:

I have three children, and I’m a single mom...And I look and I listen to my kids; now I sit back and I think “wow, we’ve made it through so much” because there was a lot of family necessity that arose just by virtue of my job. So it was “I don’t have time I’ve got to stay; I don’t have time to pick you up”—“don’t worry mom

I got somebody else; I got a ride.” All of this coordination, you know, I might say “I’m not coming home until later” they say, “don’t worry mom I got dinner.” So they all of a sudden took on the roles that I couldn’t because I was with this position...I think even to this day, I’ve won multiple awards and they go to every single ceremony, and they are proud of me, and when I see them proud of the work that I’ve done it’s really moving, and really touching to know that we’ve struggled so much as a family, we’ve been able to survive it all.

Participant 3 indicated that:

“Completely; they don’t have one [personal life]. Well I tell you; I’ll really be very frank with you; when I came here I had to support my two children and my mother...and for 14 years I didn’t marry; I was divorced; it was the corporate ladder; the complete corporate ladder; I was everywhere, evening, morning, and that’s the way. Because, even though, you know, the United States in these companies are always talking about balance; once you get in it, there is no balance. I mean, you’re supposed to have a balance, but there is really no balance, because for you to succeed and meet all of the goals you, more or less, have to dedicate your life to it. Maybe also I’m an over-achiever, if I get something I’m going to finish it....So now is when I will tell you that I start feeling that the last, maybe 2 years that I feel more life balance, and I fixed my marriage hopefully. It’s a tough country, and I will tell you that as a Hispanic it’s tough.”

Participant 9:

You have to make a decision between your personal life and your professional life. There is a point of where you can coexist, maybe a couple of hours a day, but at some point, you have to—you cannot do it all and do it all right. I admire women that say, “oh; I can be a great mom and a great professional.” I admire that, but I don’t think it’s possible. You can be as good as a mom as you can, as good as a professional as you can, but it’s not going to be perfect, because there is always so much time when you are working, or when you’re with your kids. On this is simple in theory, yeah, this is no magic: I cannot be an effective mother if I’m working, I mean how could I be doing; this is not a distance-learning when it comes to your family; you’re either there or you’re not. So I have made decisions professionally, which have affected my personal life the amount of hours that I work; the priorities that I establish.... The thing as to whether your professional life affects your personal life; it is a fact that one will affect the other; the issue is how you handle that problem; how you allow that problem to affect you, or change you, and what is the understanding as to why you’re making those decisions, and I guess your family needs to understand why these decisions are being made, and that hopefully I/we have gotten to the place. I guess there have been many instances where I know that my family has been affected, because I’m at work, or I have a commitment at work that I have to fulfill. I mean, I try my best... and they just wait for mom she’s going to make it here at some point today.

Participant 5:

Well, throughout the years probably if there's one regret: so much time I dedicated to living up to those expectations I set for myself, but maybe it should have been enough to do your job well, rather than, I have to exceed at it all the time. So that has affected my personal life, because as I was having all of those different roles I lived in eight cities in a period of 9 years, and that was in four different countries; so that really took a toll... When I was in college, I had to take two jobs. So out of the need to do that [supporting parents] I just felt a huge sense of responsibility that things stay together [family]. I was in my early 20s, and things stayed together so that kind of became more of a priority than my personal life. If I had the chance to go back and do it again, I would change that. So yes my life, my personal life, was very much affected by those career choices, and that's perhaps one thing I would change.

Role of intentionality and serendipity. The participants described their journeys to becoming an executive, which included the roles of intentionality and serendipity.

Table 17 characterizes the career progression of the participants as being fully aware of what they were doing (i.e., intentionality) vs. by luck or circumstance (i.e., serendipity).

Table 17

Perceived Roles of Intentionality and Serendipity

Characteristic	Participant
Intentionality	1, 3, 7, 8, 9, 11
Serendipity	2, 4, 5, 6, 10, 12

Note. Half of the participants actively worked their career progression, and half of the participants perceived that it just happened.

Participant 1:

I guess that I've been pretty straightforward, in a sense of always had a clear mind of where I wanted to be. I think I wanted to be in banking since I was, like, seven years old, or something, that's how I made my allowance. But anyway, in that sense I—any particular event—that I think I've been lucky to be at the right place at the right time. But as I mentioned before, as I am the one driving my career, no one else is doing it for me so in that sense, or I know it is gone to a point that this is what I've learned and have to learn in this position, and there's not much more that I can learn by staying here or by staying in this position or this institution. I am the one that needs to look at what else is the next, that so in terms of events I've been lucky staying; for example, here I started in a portfolio management role and one of the lenders left, and I know that I didn't have lending experience here, since I moved from Puerto Rico....So I was the one that went to the manager, and before they even posted the opening for the position I said "you know what, I know that you have this position that you already need to replace and I'm think I'm the perfect candidate because of such and such." So I know in

that sense it's not a matter of only waiting for things to happen, it's just, okay, so let me take the wheel and say "okay, this is the opportunity that is opening let me see what I can do about it." That's basically how I have always been able to move along. I see the opportunity and go after it.

Participant 4:

I didn't decide, it was just a natural sequence, it just; I started getting more and more responsibilities, ultimately at A-company, with the sales challenges, I was asked to take a look with all of the experience I had from Latin America, our international, I was asked to take a look at segmenting the US market, and that's when the Hispanic segment came up, which I thought was interesting, I wasn't looking for it, I was just a businesswoman looking for the opportunity, and ultimately at A-company I became the director and general manager of this huge division targeting the Hispanic population, the Hispanic. I presented a wonderful business case and sold it and ultimately became the general manager of that division; but no, I can't tell you I wanted that; what I wanted to do what was to make a difference in every position that I have ever held...I left strong footprints; I have left something that wasn't done before in every position I've ever had, and that's just a personal pride.

Differences in treatment. Table 18 shows the participants' perceptions of being treated differently; whether being treated differently affected them positively or negatively was a function of their personalities and how they reacted to it.

Table 18

If You Are Treated Differently Does It Affect You Positively Or Negatively

Effects Of Being Treated Differently	Participant
Positively	6
Negatively	2, 3, 4, 5, 8, 9
Both	7, 10
No Effect	1, 11, 12

Note. Participant's 6 positive response was attributed to individual leaders being very different, and they were open to the differences.

Participant 2:

As a Hispanic woman did I, in retrospect I think back, is I've had to think because I have been asked that question several times; it always is the personality sometimes of the individual; I've never allowed anyone to be disrespectful because I've never been disrespectful to anyone. I have built my credibility, but in retrospect there may have been times where we were in a meeting and there I was, one of two women in an entire executive team of about 12 men, 10 men and the two of us, and because of also the position I held they would say "oh we cannot talk about that in front of Participant-2." Those are some of the challenges because they just feel awkward, and sometimes men feel awkward about having women, and not all men are like that because we have progressed. But so finding a way to relieve that tension would be, if I would say something and my accent slipped a word, they would try to make fun of how I pronounce that word, to which and I've said this to people I say "well I may have mispronounced it but you get the gist of it, and I can say what I just said to you in English, and I can

also say in Spanish” you know, I would get back, I don’t let people make me feel....Again I have never felt, and I’ve worked; I worked for Y Bank; it was a multinational company; I spent time. I was responsible for the state of Florida, but I was on projects in Texas, San Francisco, and I’ve interacted with people that didn’t know Hispanic women, but I never felt that someone was trying to belittle me or make me feel less than; I would not allow it. My experiences have been—I’ve been very fortunate....But I can answer the question; obviously, if I felt that I was treated differently, in a negative sense. It would affect me negatively and I would have to work very hard to get myself, as a human being, back and have control and say “okay, how am I going to deal with the situation; how am I going to address this so that it doesn’t happen again?” and I can continue my journey.

However, there was greater consistency in their responses regarding the reasons *why* they were treated differently, as shown in Table 19.

Table 19

If You Are Treated Differently Is It Because You’re Hispanic, A Woman, Or Both

Being Treated Differently Because	Participant
Hispanic	
Woman	
Both	2, 3, 4, 7, 8, 9, 10, 11, 12
Other	5, 6
None	1

Note. Participant’s 1 response reflects the perception that she was not treated differently; however if there was any difference it was due to gender. Participant 5 stated “it is on that [other] person, and their prejudices and their biases.” Participant’s 6 response was attributed to varying styles.

Participant 2:

Those two (Hispanic and Woman): If there was [a difference in treatment] it would be those two. In a more male-dominated environment with a C-Suite as mostly, especially white males, it would be because I'm a woman, and especially if you're a minority and because I'm Hispanic. If I was [treated differently] those would be it; I don't have any other things that would.

Acquired competencies as factors in business executive effectiveness. This study adds to the cumulative body of knowledge by increasing people's understanding of Hispanic women executives' self-perceptions of leadership style, the ways they enact leadership, their contributions to organizational effectiveness, and gaining better insight into factors of leadership based upon their lived experiences. During the conduct of this study, the exploration of Hispanic women business executives' lived experiences and self-perceptions were viewed through a lens informed by the concepts of intersectionality, bicultural competence, and emotional intelligence.

Lived experience: business executive effectiveness and intersectionality. The lived experiences, of being Hispanic women executives, were explored considering the complexity and diversity of female experience (i.e., intersectionality). Intersectionality is a suitable approach for the exploration of lived experience as a means of accounting for complexity and points of intersection (McCall, 2005; Valentine, 2007). Table 20 shows the participants' perceptions of intersectionality and its effect upon business executive effectiveness.

Table 20

Lived Experience: Business Executive Effectiveness And Intersectionality

Business Executive Effectiveness	Participant
Enhanced	1, 2, 3, 4, 6, 7, 8, 9, 10, 11, 12
Diminished	10
No Effect	5

Note. Participant 5 did not acknowledge intersectionality as a factor; effectiveness was determined by what was produced. Participant 10 perceived enhanced vs. diminished depended upon the situation.

Lived experience: business executive effectiveness and bicultural competence.

The study of bicultural people, as in this study, provides opportunities to view cultural diversity in organizations differently by valuing the cultural diversity that exists *within* individuals as well as the cultural diversity *between* individuals (Brannen & Thomas, 2010). Table 21 shows the participants' perceptions of bicultural competence and its influence upon business executive effectiveness.

Table 21

Lived Experience: Business Executive Effectiveness And Bicultural Competence

Business Executive Effectiveness	Participant
Enhanced	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12
Diminished	
No Effect	

Note. All participants perceived that bicultural competence enhanced business executive effectiveness.

Lived experience: business executive effectiveness and emotional intelligence.

Emotional Intelligence is a type of social intelligence consisting of the interaction between emotions and thought, whereby the sensitivity to emotions (i.e., emotional

awareness) allows emotionally competent people to direct their own actions and the actions of others in productive ways (Corona, 2010; Mayer et al., 2004). The participants' perceptions of the importance of emotional intelligence is shown in Table 22.

Table 22

Lived Experience: Business Executive Effectiveness And Emotional Intelligence

Business Executive Effectiveness	Participant
Enhanced	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12
Diminished	
No Effect	

Note. All participants perceived that emotional intelligence enhanced business executive effectiveness.

Leadership And Leadership Effectiveness

Fiedler and Chemers (1974) defined *style* as the “relatively enduring set of behaviors which are characteristic of the individual regardless of the situation” (p. 40). This interpretation of an enduring set of behaviors resembled an interpretation of traits; however, the focus of style was on sets of behaviors, and there was a clear distinction between what a leader *is* (i.e., traits) vs. what a leader *does* (i.e., behaviors). This section will focus upon what a leader is (i.e., style), followed by what a leader does (i.e., behavior).

Self-perceptions of leadership style. The participants' perceptions of their leadership styles are shown in Table 23.

Table 23

Self-Perceptions Of Leadership Style

What Is Your Leadership Style	Participant
Autocratic	
In-Between	5, 7, 10, 11
Participative	1, 2, 3, 4, 6, 8, 9, 12
Laissez-faire	

Note. While all participants acknowledged the need to be directive at times (i.e., autocratic); participants with in-between style responses placed heavier weight on being directive than those participants who chose a participative style.

Achieving effective outcomes: Best way to lead. Is there one-best-way to lead?

A person might have agreed with Fiedler and Chemers (1974), Hersey and Blanchard (1988), Blake and Mouton (1978), or Vroom and Yetton (1973). Table 24 depicts the participants' perceptions regarding the best way to lead.

Table 24

Implementing Your Leadership Style To Achieve Effective Outcomes

Best Way To Lead	Participant
A. There <i>is</i> one-best-way to lead, and it should be followed for all people and in all situations.	4
B. There <i>is</i> one-best-way to lead, but its application might vary according to the needs of the person(s) and the situation.	2, 3, 7, 8, 10, 12
C. There <i>is not</i> one-best-way to lead, and the leadership style is contingent upon the situation (i.e., the leadership style changes based upon the situation).	1, 5, 6, 9, 11

Note. Participant's 4 response reflected that she did it the same way every time and it has worked.

Models used in leadership or decision making. Trait theory alone or behavior theory alone provided limited predictive power, but when combined with situational

factors predictive power was increased; therefore, leader emergence was considered to be contingent upon personal characteristics (i.e., traits or behaviors) *and* upon the situation (Stogdill, 1974), as shown in Table 24. Any leadership or decision-making models used by the participants are summarized in Table 25.

Table 25

Models Used In Leadership Or Decision Making

Participant	Model Name	Model Description
Participant 1	Unknown	A merging of things in that sense.
Participant 2	Combination	What is the situation; Who are in the situation; What is/are the issue(s); How is it going to impact others; Planning; Prioritizing; Meeting; Getting to the outcome; Evaluating what was done; Make any adjustments as necessary.
Participant 3	Rating system	Identify critical points; Rate critical points from 1 to 5; Aggregate rating scores.
Participant 4	Unknown	Gather information; Gather insight; Engage the team; Determining the best strategy.
Participant 5	Unknown	What is the goal; How do we get there; Review tools—actual tools or people; Let's do it together.
Participant 6	Inclusive	Measured; Deliberative; What are the implications?
Participant 7	None	Skills based.
Participant 8	None	
Participant 9	Situational	Use the best model for the situation.
Participant 10	Unknown	Common sense.
Participant 11	None	
Participant 12	Servant leadership	

Note. Inconsistency in the use of models is shown: See recommendations section.

Self-perceptions of leadership behavior (enactment). The participants' perceptions of their leadership behaviors (i.e., what a leader *does*) are shown in Table 26.

Table 26

Self-Perceptions Of Leadership Behavior (Enactment)

Your Leadership Behavior	Participant
Transactional	
In-Between	1, 2, 3, 4, 5, 6, 7, 8, 9, 11, 12
Transformational	10

Note. Participant 10 chose a strictly transformational behavior response. In-between behavior responses placed heavier weight on also being transactional.

The following excerpts describe participants' perceptions of *misunderstood aspects* of leadership behavior. Participant 2:

The most misunderstood aspects of my leadership is when one of our very senior-level individuals has an employee performance issue where they want to make a change and I say "you cannot do that because of A, B, and C, it may be policy so we are not going to do that. It may be that we do not—we have not given the employee the opportunity to improve and communicate what the plan should be." So those are the aspects of my leadership; they don't want to hear no. That there are times that I have to say no because I have to protect the employees, I have to protect the institution, I have to protect them, and that's our role, HR, we defend our positions when we make a decision, we have to defend that position, we have to go to court, we need to make sure that we have been consistent, that we have not discriminated. There are times I have to say no, and those are the times when that aspect that people may find that my leadership role is not—that the leadership

style is say "not wanting to take risks." I take risks, but there are certain things that we cannot take the risk because the outcome is going to be negative all around.

Participant 4:

About me, maybe my openness. People can work for me or against me. Somebody will come in and maybe not realize that there is a fine line that you could cross; for example my openness, my approachability, and so forth: but to come in and shoot the breeze, and, you know, like somebody else, you don't do that. Just the openness maybe, you know, and it goes back to everyone coming to the table without the same reference of experience. Having had a corporate experience you kind of know, you learn, that not to sit here and shoot the breeze, and whatever, and talk to you about a car they're renting or something like that. Sometimes people mistakenly think approachability means I can just let my hair down, and that kind of thing, and maybe that isn't appropriate.

Participant 6:

I have a very good answer for that: I always say "do not mistake calmness for complacence" just because I'm not; a lot of leaders think that I'm not pushing the envelope, but I do push the envelope in a very quiet way. And I push people along with or without them not even knowing that I'm pushing them along. I think people think I'm a softy, and that I don't make tough decisions, but I really do make the tough decisions. And it might appear, when a leader first sees my style and how I carry myself, I'm very calm and collected they think of me "that person

probably doesn't get tizzy about anything or probably doesn't make strong decisions because they're calm and collected.”

Participant 7:

The most misunderstood aspects of my leadership is that, as a women, I am not going to work as hard and accomplish as much; that we have a soft spot; that just because we're nice to our employees that we're not going to be as effective. I think that's a complete misnomer. Misunderstood behaviors are to be task oriented as a woman; to be very conscious that we have all of this to do, and it needs to be accomplished and it needs to be done. So I guess the accountability aspect of requiring, being direct, and not mincing words that if you are direct then you're a bitch—that's pretty much it.

Participant 8:

I think sometimes, like my ability to communicate, you know, my ability to influence. When I think misunderstood I don't think I always—one of the key elements of my effectiveness as a leader is building relationships, building loyalty, kind of, engaging people, because they feel empowered and motivated. And I don't know that I always get credit for that. And I think, again because in the higher-level meetings, presentations, I'm not always that confident. I think that also impacts and I could be perceived as not having authority or knowing things.

Self-efficacy and success as a leader. Self-efficacy has been considered an important characteristic for successful leadership (Bandura, 1997; Bass, 1990). “Self-

efficacy is concerned not with the number of skills you have, but with what you believe you can do with what you have under a variety of circumstances” (Bandura, 1997, p. 37).

Table 27 shows the participants’ perceptions of self-efficacy.

Table 27

Perceptions Of Self-Efficacy

Self-Efficacy	Participant
High	3, 4, 5, 7, 8, 9, 10, 11, 12
In-Between	1, 2, 6
Low	

Note. Nine of the participants responded with high self-efficacy; however, three felt they could always do better and gave in-between responses.

Contributing factors in leadership effectiveness. The self-perceptions of leadership effectiveness were explored in relation to the contributing factors of intersectionality, bicultural competence, and emotional intelligence.

Self-perceptions of leadership effectiveness and intersectionality. Table 28 shows the participants’ perceptions of intersectionality and its influence upon leadership effectiveness.

Table 28

Leadership Effectiveness And Intersectionality

Leadership Effectiveness	Participant
Enhanced	1, 2, 3, 4, 6, 7, 8, 9, 10, 11, 12
Diminished	
No Effect	5

Note. Participant 5 did not acknowledge intersectionality as a factor; effectiveness was determined by pride, who you were as an individual, and what was the right thing to do.

Self-perceptions of leadership effectiveness and bicultural competence. Table 29

shows the participants' perceptions of bicultural competence and the influence upon leadership effectiveness.

Table 29

Leadership Effectiveness And Bicultural Competence

Leadership Effectiveness	Participant
Enhanced	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12
Diminished	
No Effect	

Note. All participants perceived bicultural competence enhanced leadership effectiveness.

Self-Perceptions Of Leadership Effectiveness And Emotional Intelligence. The participants' perceptions of the importance of emotional intelligence is shown in Table 30.

Table 30

Leadership Effectiveness And Emotional Intelligence

Leadership Effectiveness	Participant
Enhanced	1, 2, 3, 4, 5, 6, 7, 9, 10, 11, 12
Diminished	8
No Effect	

Note. Participant's 8 response reflected the perception that an emotional reaction gets in the way of being able to be effective in that moment.

Organizational Effectiveness

Organizational effectiveness relates to how well an organization can achieve its goals (Chi et al., 2012; Lusthaus et al., 2002; Lusthaus et al., 1997). Schein (2004) explained the influential forces of culture in social and organizational situations were

powerful; that culture and leadership were "two sides of the same coin" (pg. 1). Explored were the participants' perceptions of their companies' culture and their perceived contributions to organizational effectiveness.

Perceptions of company culture. Table 31 shows the participants' perceptions of their companies' cultures. The responses in Table 15 regarding the participants' cultural setting at work were similar. The distinction is discussed in chapter 5.

Table 31

Perceptions Of Company Culture

Company Culture	Participant
Hispanic	9
Non-Hispanic	1, 8, 11, 12
Multicultural	2, 3, 4, 5, 6, 7, 10

Note. Table 31 Multicultural includes any/all combinations vs. Table 15 Mixed included Hispanic and non-Hispanic only.

Effects of the company's perceptions (assumptions) of Hispanic women's leadership behaviors. Do the companies' perceptions (i.e., assumptions) regarding Hispanic women's leadership behaviors affect the companies' perceptions of the participants' organizational effectiveness? Table 32 reveals the participants' perceptions.

Table 32

Effects Of The Company's Perceptions (Assumptions) Of Hispanic Women's Leadership Behaviors

Perceived Organizational Effectiveness	Participant
Enhanced	1, 2, 8
Diminished	7, 9
No Effect	3, 4, 5, 6, 10, 11, 12

Note. Participants 1, 2, and 8 perceived effectiveness was enhanced because diversity was valued and complemented the organization. Participants 7 and 9 perceived effectiveness was diminished due to preconceived ideas that Hispanic women were not as effective as other leaders.

Self-perceptions of contributions to organizational effectiveness. The participants' perceptions of their contributions to organizational effectiveness are presented. Table 33 shows the three most important contributions to organizational effectiveness that each participant makes.

Table 33

Three Most Important Contributions To Organizational Effectiveness

Participant	Perceived Contributions		
	1	2	3
Participant 1	Being a role model	Team oversight	Followership
Participant 2	Knowing my field	Being credible	Institutional support
Participant 3	Strategic thinking	Passionate energy	Loyalty
Participant 4	Define roles and responsibilities	Communicate vision	Hold people accountable
Participant 5	Take charge	Commitment	Loyalty
Participant 6	Balance between people and profit	Organizational structuring	Inclusiveness worldview
Participant 7	Knowledge in management and technology	Woman's perspective	Hispanic perspective
Participant 8	Strategy; ground positioning	Marketing skills	Develop talented people
Participant 9	Communicate vision	Utilize internal resources	Crisis management
Participant 10	Strategic direction	Financial stewardship	Relationship building
Participant 11	Provide frequent training	Ensuring consistency	Model effective work practices
Participant 12	Very tight shop	Accepting responsibility	Trust in delivering

Note. The participants revealed the three most important contributions to organizational effectiveness that they make.

Contributing factors in organizational effectiveness. The self-perceptions of organizational effectiveness were explored in relation to the contributing factors of intersectionality, bicultural competence, and emotional intelligence.

Organizational effectiveness and intersectionality. Table 34 shows the participants' perceptions of intersectionality and its influence upon organizational effectiveness.

Table 34

Organizational Effectiveness And Intersectionality

Organizational Effectiveness	Participant
Enhanced	1, 2, 3, 4, 6, 8, 9, 10, 11, 12
Diminished	7
No Effect	5

Note. As in Table 28, Participant 5 did not acknowledge intersectionality as a factor, and it should not affect what they do. Participant 7 perceived the inequality Hispanic women faced prevented them from being effective organizational leaders.

Organizational effectiveness and bicultural competence. Table 35 shows the participants' perceptions of bicultural competence and the influence upon organizational effectiveness.

Table 35

Organizational Effectiveness And Bicultural Competence

Organizational Effectiveness	Participant
Enhanced	1, 2, 3, 4, 5, 6, 7, 8, 9, 10, 11, 12
Diminished	
No Effect	

Note. All participants perceived bicultural competence enhanced organizational effectiveness.

Organizational effectiveness and emotional intelligence. The participants' perceptions of the importance of emotional intelligence is shown in Table 36.

Table 36

Organizational Effectiveness And Emotional Intelligence

Organizational Effectiveness	Participant
Enhanced	1, 2, 3, 4, 5, 6, 7, 9, 10, 11, 12
Diminished	8
No Effect	

Note. As in Table 30, Participant's 8 response reflected the perception that an emotional reaction or dealing with the emotions of others takes time away from doing her job.

Summary

The purpose of this phenomenological study was to explore the lived experiences of Hispanic women in business executive-level positions located in the southeastern region of the United States. Face-to-face interviews were conducted with 12 participants. The rich and detailed descriptions of each participant's lived experiences and self-perceptions were audio recorded, transcribed, analyzed, coded, and presented. Also presented was demographic information relevant to the study. The conceptual framework of the study and the structure of the interview questions focused the participants' responses upon the research questions; however, the use of semistructured interviews allowed additional themes to emerge.

The results suggest that the lived experiences of these Hispanic women business executives imparted competencies associated with intersectionality, bicultural competence, and emotional intelligence. Furthermore, these competencies were associated, positively in most cases, with general business executive effectiveness, leadership effectiveness, and organizational effectiveness.

In chapter 5, I present an interpretation and discussion of these findings. Also discussed are the limitations of the study, recommendations suggested by the participants and myself, and implications for social change. In the conclusion, the elements of the study are reduced to rhetorical discourse.

Chapter 5: Discussion, Conclusions, and Recommendations

The problem was that there is little known about the lived business experiences of Hispanic women executives. For example, Hite (2007) found that most of the gender research in managerial and professional positions included White women and excluded those of other racial, ethnic, and cultural backgrounds; and Stone, Johnson, Stone-Romero, and Hartman (2006) noted the paucity of research examining the relations between cultural values and job choice preferences. Hispanic women in the management, professional, and related occupations have the lowest U.S. civilian labor force participation rates, when compared by race and ethnicity. Additionally, the projected long-term trend was that low participation rates will persist through 2050 (Toossi, 2006; U.S. Bureau of Labor Statistics, 2014a; U.S. Census Bureau, 2014).

The purpose of this phenomenological study was to explore the lived experiences of 12 Hispanic women in business executive-level positions located in the southeastern region of the United States. I selected semistructured face-to-face interviews as the primary data collection method because it supplies the rich and detailed descriptions of each participant's lived experiences and self-perceptions of their leadership styles, the ways they enact leadership (i.e., behavior), and their contributions to organizational effectiveness; increasing understanding and providing insight into factors of leadership based upon those lived experiences.

As a result of living in various U.S. cities and countries during childhood, the participants experienced diversity early in life. This variety of experience provided a foundation for the recognition, acceptance, and understanding that people and cultures

have many differences. These experiences with diversity imparted a wider view of the world and enhanced their interpersonal relationships. In the following sections, I discuss an interpretation of the findings that provides a juxtaposition of the participants' lived experiences and self-perceptions with the research questions. Additionally, a discussion of the limitations of the study, recommendations, implications, and conclusions are presented.

Interpretation of Findings

The overarching research question for this study was: What are the lived business experiences of Hispanic women executives regarding leadership effectiveness? The exploration of the following research questions provided some enlightenment:

- Research Question 1: Which leadership competencies and behaviors, acquired through the lived experiences of being a Hispanic woman business executive, do the group members have in common?
- Research Question 2: What are Hispanic women business executives' perceptions of their leadership style?
- Research Question 3: What are Hispanic women business executives' perceptions of the ways they enact leadership?
- Research Question 4: What are Hispanic women business executives' perceived contributions to organizational effectiveness?

Research Question 1

Which leadership competencies and behaviors, acquired through the lived experiences of being a Hispanic woman business executive, do the group members have

in common? A review of the U.S. cities and countries where the participants lived during childhood demonstrate the variety of people and cultures experienced. The participants lived in 24 U.S. cities and 10 different countries and attributed much of their ability to understand, empathize, and interact with various people to their having lived among other cultures. Some of the participants expressed concern for young people who have not had exposure to other cultures or those experiences that teach how to interact with diverse groups or people different from themselves, and it was perceived that the absence of those experiences will be a disadvantage as they begin interacting with the wider world around them. Participant 11 worried about her children and said, “how are they going to learn that there are so many different types of people; how are they going to succeed without having that exposure that I had?”

I asked the participants if they perceived they were treated differently at work, and “if you are treated differently does it affect you positively or negatively?” Their responses were varied; however, half of the participants were affected negatively by the differences in treatment. There was greater consistency regarding the perceived reasons for being treated differently. Nine participants felt they were treated differently because of being both a Hispanic and a woman; two cited other factors such as being in a position of authority or simply by having different styles, and one felt there were no differences in treatment.

Intersectionality. Intersectionality refers to a theoretical and methodological approach to inequality; it presupposes that categories of structural inequities (i.e., gender, race, class, ethnicity, etc.) intersect and produce complex relationships and emphasizes

the “nonadditive effects of multiple forms of oppression” (Choo & Ferree, 2010, p. 132). The participants’ life experiences with other people and cultures provided them with a broader perspective and a better understanding of the differences each person might bring to the table. The participants’ awareness of differences was perceived as an advantage when making connections with other people.

I asked the participants if their lived experiences being a Hispanic woman (i.e., intersectionality) enhanced, diminished, or had no effect upon their business executive effectiveness. Ten participants responded that intersectionality enhanced business executive effectiveness; Participant 10 replied that enhanced effectiveness or diminished effectiveness would depend upon the situation, and Participant 5 said that intersectionality had no effect—effectiveness was determined by what was produced.

Bicultural competence. The second concept, that I explored regarding the participants’ lived experiences, was bicultural competence: Bicultural refers to individuals that have been born into or acquired more than one cultural schema. Bicultural competence refers to cultural knowledge and cross-cultural abilities that are used to interact effectively with others in cross-cultural contexts by individuals who have been exposed, and have internalized two or more cultures (Benet-Martinez et al., 2002; Hong, 2010; Hong et al., 2000; Nguyen & Benet-Martinez, 2007, 2013). Building upon how the participants benefited from living with different people and cultures, their perceptions and feelings of being bicultural were explored.

Many of the participants spoke only Spanish at home during childhood even though they were living in the U.S., and now they live and work in diverse environments.

Participant 5 explained that bicultural meant, “being able to engage and live your day to day in either culture,” and Participant 1 said, “it’s interesting how to see, as your world expands, you find that difference in differences in culture. You start to understand people better, and you open your mind as well.”

I asked the participants about their cultural settings at home and at work. The choices were Hispanic, non-Hispanic, or mixed. Their responses to the cultural setting at home were: four Hispanic, one mostly Hispanic, five mixed, and two non-Hispanic. Their responses to the cultural setting at work were: one mostly Hispanic, nine mixed, and two non-Hispanic. Note that only two participants maintained non-Hispanic households and three participants had non-Hispanic workplaces. All others were either Hispanic or mixed. Their childhood cultural experiences combined with their current environments suggests all of the participants live bicultural existences.

Being bicultural expanded their abilities for understanding differences and interacting more effectively with diverse groups and individuals. I asked the participants if bicultural competence enhanced, diminished, or had no effect upon their business executive effectiveness. All of the participants perceived bicultural competence enhanced business executive effectiveness.

Emotional intelligence. Emotional intelligence refers to the capacity to solve problems through the management of one’s own emotions and those of others (Corona, 2010; Mayer & Salovey, 1993; Mayer et al., 2004; Salovey & Mayer, 1990). Participant 9 said, “I think you have to establish the emotional connection first; the other person has to know that you are there at the same emotionally; you’re not detached; you are not

somewhere else.” The participants exhibited a genuine caring for people and felt that an emotional connection was crucial for communicating and achieving common goals. Jorfi and Jorfi (2012) conducted a study that showed a significant and positive relationship between emotional intelligence and communication effectiveness. Participant 1 described herself as: “I believe that I have really been aware of how people are feeling and I try, but to do my best when communicating to other people, being aware of their circumstances, and knowing what’s happening in their lives;” Participant 9 explained, “somehow in order to achieve the common goals we have to be connected emotionally, otherwise it doesn’t work.”

I asked the participants if emotional intelligence enhanced, diminished, or had no effect upon their business executive effectiveness. All of the participants perceived emotional intelligence enhanced business executive effectiveness. There were differences in perceptions of whether their sensitivity to the feelings and emotions of others was a manifestation of maturity or was due to being a Hispanic, a woman, or both; regardless, it was clear they perceived emotional intelligence was an important factor in communicating effectively, achieving common goals, and business executive effectiveness.

Acquired competencies and factors of leadership. Intersectionality, bicultural competence, and emotional intelligence are considered factors of leadership.

Intersectionality being an abstract concept that represents a level of awareness and understanding of the diversity of people and cultures from a female perspective that enhances interpersonal relationships. Bicultural competence is a functional concept, or

skill, that is applied directly in daily life as bicultural individuals effectively interact with others in cross-cultural contexts (Benet-Martinez et al., 2002; Hong, 2010; Hong et al., 2000; Nguyen & Benet-Martinez, 2007, 2013). Emotional intelligence is also a functional concept, or skill, that is a type of social intelligence consisting of the interaction between emotions and thought, whereby the sensitivity to emotions (i.e., emotional awareness) allows emotionally competent people to direct their own actions and the actions of others in productive ways (Corona, 2010; Mayer et al., 2004).

Many people possess these competencies to some degree; however, the uniqueness of the participants' lived experiences, as a group, they have in common: all of the participants experienced diversity by virtue of the places they've lived, all of the participants are women, and all of the participants are Hispanic. Furthermore, all of the participants perceived that intersectionality, bicultural competence, and emotional intelligence enhanced business executive effectiveness, with few exceptions.

Research Question 2

What are Hispanic women business executives' perceptions of their leadership style? I asked the participants to choose a leadership style that best described themselves given the choices (a) autocratic leader, (b) participative leader or (c) laissez-faire leader. Eight of the participants chose a participative style to describe themselves; four participants asked for an "in-between" category representing somewhere between autocratic leadership style and participative leadership style; no one selected laissez-faire. While all participants acknowledged the need to be directive (i.e., autocratic) at times, for example when deliverables were at risk; participants with "in-between" responses

perceived themselves as participative but including autocratic because it was either their inherent style or the underlying character of their deliverables were more transaction oriented.

Blake and Mouton (1978) believed there existed a one-best-way to lead based upon the basic principles of human relationships. I asked the participants, “what are your perceptions regarding the best way to lead?” The three choices were as follows:

- A. There *is* one-best-way to lead, and it should be followed for all people and in all situations.
- B. There *is* one-best-way to lead, but its application might vary according to the needs of the person(s) and the situation.
- C. There *is not* one-best-way to lead, and the leadership style is contingent upon the situation (i.e., the leadership style changes based upon the situation).

Participant 4 provided the only A response and explained, “that she did it the same way every time and it has worked.” Six participants chose B—Participant 12 provided this representative response, “I have a leadership style and I don’t think that, even if I wanted to change that I’m not going to change that drastically, because you’re not going to change your traits from one day to the other.” Five participants chose C.

Eleven participants perceived that the situation influenced their leadership style. The differences were to what extent: was the leadership style flexible in its application to the situation?, (i.e., B), or did the leadership style change contingent upon the situation?, (i.e., C). In either case, the goal was to match the leadership style with the situation to achieve the most effective outcome.

Research Question 3

What are Hispanic women business executives' perceptions of the ways they enact leadership? I asked the participants to choose a leadership type (i.e., behavior) that best described themselves given the choices (a) transactional leadership, (b) transformational leadership, or (c) in-between. Participant 10 gave the only transformational leadership response; eleven participants with "in-between" responses perceived themselves as transformational but including transactional because it was either their inherent behavior or the underlying character of their deliverables were more transaction oriented, as it was in the case of leadership styles.

There were inconsistencies regarding the use of leadership models. Participant 2 used a combination model, Participant 6 an inclusive model, Participant 9 a situational model, Participant 10 used common sense, and Participant 12 embraced servant leadership; however, all other participants did not use any model or the names of the models were not known. Participant 2 described a leadership model that loosely represented the model used by all of the participants: (a) clearly state the expectations, (b) verify the expectations were understood, (c) negotiate deadlines, (d) inspect what I expect; "I inspect because I have to go back to them and inspect what I expected so I can provide additional resources or remove obstacles that may be preventing them from doing what they needed to do," (e) follow-up review of what did work and what did not work. Participant 3 used a rating system for decision making: (a) identify critical points of the decision, (b) rate each critical point on a scale of 1 to 5, and (c) aggregate the rating scores. The highest score indicated the preferred choice.

Leadership effectiveness and factors of leadership. I asked the participants if intersectionality enhanced, diminished, or had no effect upon their leadership effectiveness. Eleven of the participants perceived intersectionality enhanced leadership effectiveness. Participant 5 did not acknowledge intersectionality as a factor; effectiveness was determined by pride, who you were as an individual, and what was the right thing to do. The results of this study are consistent with the results of a meta-analysis conducted by Eagly et al. (2003) to address issues of gender and leadership styles. Their results showed that (a) transformational leadership style might be more congenial to women and mitigate role incongruity, and (b) there were positive correlations between all of the components of transformational leadership and leaders' effectiveness.

I asked the participants if bicultural competence enhanced, diminished, or had no effect upon their leadership effectiveness. All participants perceived bicultural competence enhanced leadership effectiveness. Various abilities associated with bicultural competence include: an individual's ability to navigate both the dominant and the nondominant cultures (LaFromboise et al., 1993); the perceptions of increased intellectual flexibility and creativity (Benet-Martinez et al., 2006); and the capacity to acknowledge competing perspectives and to forge the conceptual links between these perspectives (i.e., differentiation and integration), as functions of integrative complexity in a bicultural context (Suedfeld, Tetlock, & Streufert, 1992; Tadmor & Tetlock, 2006; Tadmor, Tetlock, & Peng, 2009).

I asked the participants if emotional intelligence enhanced, diminished, or had no effect upon their leadership effectiveness. Eleven of the participants perceived emotional intelligence enhanced leadership effectiveness. Participant 8 responded that emotional intelligence diminished leadership effectiveness and expressed the perception that an emotional reaction, “gets in the way of my being able to be effective in that moment.”

Participant’s 6 response was representative of the majority:

Emotional intelligence, oh my gosh that is so important. If anything, I think a lot of leaders are missing that nowadays; is to you’ve got to connect emotionally with people, because if you’re just robotic about it; you’ve got to read the body language; you’ve got to ask the questions of “how do you feel about this” and to be able to make sure that you are truly connecting and that they are going to go away understanding what you’ve asked of them, and that they are in a frame of mind, emotionally, to do what you are asking them to go do.

Self-efficacy has been considered an important characteristic for successful leadership (Bandura, 1997; Bass, 1990). The participants were asked their perceptions of their self-efficacy given the choices (a) high, (b) low, or (c) in-between. Nine of the participants responded with high self-efficacy; three felt they could always do better and gave in-between responses. In a study of Latina leaders in higher education, Montas-Hunter (2012) found that all of the study participants considered high self-efficacy a factor in their success. The results of this study are consistent with Montas-Hunter’s (2012) study results.

All of the participants perceived that intersectionality, bicultural competence, and emotional intelligence enhanced leadership effectiveness, with few exceptions.

Additionally, the results of this study are consistent with Galante's (2010) study, which found that Mexican American women in leadership roles considered their Hispanic culture a positive influence that fostered abilities consistent with transformational leadership.

Research Question 4

What are Hispanic women business executives' perceived contributions to organizational effectiveness? The participants were asked their perceptions of their companies' cultures. The responses were: one mostly Hispanic, three Non-Hispanic, and eight multicultural. These responses were similar to the responses to their cultural settings at home and work. The difference was in the scope of the question: their perceptions of their overall company culture vs. their perceptions of their home and immediate workgroup or organization culture. In comparison, both tables displayed three Non-Hispanic cultural environments and nine mixed or multicultural environments; again demonstrating this group of Hispanic businesswomen exist in diverse environments.

The participants were asked to list the three most important contributions to organizational effectiveness that they make. There were very few duplicate responses between participants; however, there was a relational element across the responses of each participant.

I asked the participants if their lived experiences being a Hispanic woman (i.e., intersectionality) enhanced, diminished, or had no effect upon their organizational

effectiveness. Ten of the participants perceived intersectionality enhanced organizational effectiveness. Again, Participant 5 did not acknowledge intersectionality as a factor, “I don’t think it does, because what we are talking about very specifically doesn’t matter whether your gender, or this, or that, or the other makes a difference, no I don’t think it makes a difference.” However, Participant 7 said:

It definitely diminishes it, the inequality that women and Latinas face in the workforce, in corporate America, I think diminishes our effectiveness because it doesn’t allow us to even have the opportunity to be executives, and to, you know, we have to completely use all of our talents and our multicultural skills and what we bring to the table to make it happen.

I asked the participants if bicultural competence enhanced, diminished, or had no effect upon their organizational effectiveness. All participants perceived bicultural competence enhanced organizational effectiveness. Hong (2010) provided a conceptual model of bicultural competence that, “identified the critical dimensions of bicultural competence in cross-cultural interactions” (p. 110), and associated bicultural competence with the specific multicultural team roles that advanced multicultural team effectiveness (i.e., boundary spanner, conflict mediator).

I asked the participants if emotional intelligence enhanced, diminished, or had no effect upon their organizational effectiveness. Eleven of the participants perceived emotional intelligence enhanced organizational effectiveness. Again, Participant 8 expressed the perception that an emotional reaction or dealing with the emotions of others takes time away from doing her job.

In a study conducted by Corona (2010), it was found that (a) test scores for Hispanic Americans' emotional awareness were significantly higher than normative data scores—demonstrating high levels of communication and social skills, (b) significant differences between Hispanic Americans' transformational leadership scores and normative data scores, and (c) suggested a linkage between bicultural Hispanic Americans, higher emotional intelligence scores, and effective leadership. Alternatively, Weinberger's (2009) study concluded that there was no relationship between emotional intelligence, a leader's style, and a leader's organizational effectiveness. Based upon the participants' responses the results of this study confirm the Corona (2010) study.

Limitations of the Study

In conducting this research, I did not consider the perceptions of subordinates, peers, leaders, or family members, as the study was confined to the perceptions and feelings of the 12 study volunteers who met the requirements for participation. A second consideration was that the participants were Hispanic females, and I am a non-Hispanic male; although the participants seemed to speak and understand English very well there exists the possibility of misinterpretation of the questions, responses, or both.

The sampling method that I used (i.e., purposive sampling) limits the generalizability of the results beyond the study group, and transferability may be affected by the small sample size and the sample being selected from one specific region of the United States out of several possible regions. The participants were selected from the southeastern region of the United States; however, the South Florida area consisting of Miami-Dade, Broward, and Palm Beach counties report Hispanic population percentages

of 65.8%, 26.6%, and 20.3 % respectively (Florida Department of Health, Division of Public Health Statistics & Performance Management, 2014), which may not be representative of other U.S. regions. Hispanic women business executives were the focus of the study; therefore, the findings would not be generalizable to women in education, medicine, social work, politics, etc.. These factors will need consideration when making similarity judgments (Lincoln & Guba, 1985).

Recommendations

Participant 7 suggested legislative changes to the laws protecting individuals in cases of discrimination, which need to be standardized across the U.S. and strengthened. Without adequate laws, the victims of discrimination have no recourse. Participant 7 said:

The first thing that I would do and I think that needs to happen, is the equal rights amendment needs to be ratified. We are three states away from it, which will give equal standing for women all over. Right now there are laws in the different states that protect women; it's so difficult if you are being discriminated against; if you're being treated differently because you're a woman; it's so difficult for you to remedy the situation.

Organizational changes included suggestions from Participant 8 and Participant 2. Participant 8 said, "Promote them [Hispanic women]. Get them into leadership positions. That's the only way it's going to happen." Participant 2 stated:

I have to say that the changes would have to be in, it is not specifically for women leaders or women Hispanic leaders, but changes to ensure that the

organization always has a fair understanding of the workforce that they have.

That's just a positive thing, not specifically women and Hispanic women.

My recommendation for individual development includes, as part of a continuing education program, instruction and practice using various decision-making models to enhance decision making: Considering that the participants valued their experiences at the National Hispanic Leadership Institute and the Center for Creative Leadership, and the study results revealed inconsistencies in the use or application of leadership models and the underutilization of models for decision making. In addition, Participant 7 explained:

Another thing is that we women don't support each other as much; is like I had to go through all of this, and you're going to have to go through it on their own too, if you want to get to where I am. There is no mentorship; there is no let me open up the way for others; let me create an organization, or something, or buddy system, inside this corporation to make sure that those youngsters that are coming after know, like "these are the rules of the game" and "please don't dress like that." You can dress like that in private when you're home but don't come to work dressed like what everyone perceives you to be; not that it's wrong; everybody can dress however; but it's almost like becoming that bad perception; there isn't that comradery; there isn't that willingness to do for others so they don't have to go through all that.

Young people need educational opportunities to interact with people from different cultures, letting them experience that diversity and opening their minds to a

wider world. Additionally, emotional intelligence should have a higher value placed upon it and should be taught in schools. Participant 7 explained:

Oh tremendously; I think that we; that should be more nurtured in school as part of the learning process, the educational process, of society as a whole. More emotional intelligence needs to be motivated rather than just book learning and analytical skills. It's truly important, because if you don't have emotional intelligence, if you don't know how you feel, and you don't know how to relate to others that they might feel differently, or culturally just by nature, it diminishes your effectiveness as a leader and as an executive in the workplace, and in your personal life also.

Opportunities for Future Research

Opportunities for future research include:

- Same study: Different regions.
- Same study: non-Hispanic participants.
- Same study by country of origin.
- Comparative study between regions: Same study.
- Comparative study Hispanic vs. non-Hispanic: Same region.
- Comparative study Hispanic vs. non-Hispanic: Different regions.
- Cross-study analysis between professions.
- Hispanic women in politics.

Yammarino (2013) suggested that culture and leadership continue to be an underresearched area. Additional work is needed on minorities who will soon be the new

majority and will soon be the new majority leaders. A recent study conducted by Cárdenas et al. (2014) included 162 Latin American women from 17 countries who attained first-level (i.e., chief executive) or second-level (i.e., executive office, vice president) positions in private sector companies. Semistructured interviews explored “career challenges and barriers, leadership style, ambition, personal goals and work-life balance, plus two open-ended questions about men and women’s leadership differences” (p. 2). The results support the findings of this study in areas of perceived discrimination and leadership styles; however, cultural differences and cultural challenges focused attention upon other areas such as machismo and the strength (i.e., influence) of family obligations.

Implications

A significant increase in the Hispanic population will affect the cultural landscape of the United States. As the U.S. Hispanic population becomes a larger demographic of society, the acculturation between Hispanic and non-Hispanic people will influence attitudes regarding discrimination and gender/race segregation, multicultural family and workplace relationships, and of social change initiatives such as equal employment opportunity policies.

This study is of significance to scholars by addressing a gap in the literature regarding Hispanic women business executives and by complementing existing studies concerning the occupational underrepresentation of Hispanic women. Occupational segregation matters because it provides a measurement of progress associated with wage gap analysis and the economic status of minorities (Hegewisch et al., 2010). Holvino

(2010) highlighted the lack of recognition of the importance of the relationships between race, class, gender, and ethnicity, by organizational studies and organizational change scholars. The outcomes of this study addressed these concerns by revealing how self-perceptions of leadership effectiveness and organizational effectiveness were affected through the lived experiences of this study group.

The significance to leader groups includes that participants may become more aware of their perceptions and adjust their behavior as a result of engaging in self-reflection and recounting their lived experiences in a leadership context. Organization leaders will gain better understanding of Hispanic women business executives' perspectives and competencies. Additionally, organizations interested in creating more inclusive and attractive environments for Hispanic women would recognize these attributes in a favorable light and provide leadership opportunities for Hispanic women to further organizational goals. Organizations would be moving away from using quotas and effectively *not* using Hispanic women leaders; as Participant 9 explained, "the opportunity for Hispanic women to become leaders should not be an act of fad or even an organization goal. We need to see women for who they are," and from an organizational perspective, "a good leader is a good leader, regardless of whether you are female, Hispanic or not" (Participant 9). As more organizations embrace and incorporate diversity, they become more like, "Hispanic is just one pillar as we think about diversity...Hispanic is taken into account the same as any other culture and used to benefit the organization, and benefit the teams" (Participant 6). In addition, occupational segregation matters because employers are restricted to a smaller and less motivated pool

of qualified candidates, which affects organizational productivity negatively (Hegewisch et al., 2010; Queneau, 2005).

Young Hispanic women will obtain from these findings an impression of what it is like being a business executive, what a career path might look like, and what adjustments were made in the participants' personal lives. Half of the participants were aware of their career paths, anticipated their career choices, and worked towards achieving their goals; while the other half experienced opportunities of chance or circumstance—it just happened. Regardless, as roles changed the demands of their new roles forced the transformation of responsibilities and relationships at home. Each situation was different, but the reality was that if you were at work then you were not at home. The study participants and their families contrived ways to achieve work-life balance—for them, and in each situation the participants' relationships evolved a new equilibrium.

The significance of the study for positive social change is based upon the premise: “social life is comprised of people who exist through space and time” (Poole, 2004, p. 17), in which people play a key role in organizational change and innovation. The people, in this case, are Hispanic women business executives; the space is the workplace and the global business environment, and time is oriented towards the future. The U.S. Census Bureau (2012b) projected that the Hispanic population will increase dramatically through 2060, and so ought the number of Hispanic women available and willing to assume business leadership roles. Through the conduct of this study the voices of these Hispanic women business executives might (a) increase awareness of the underrepresentation of

Hispanic women in the management, professional, and related occupations; (b) promote the inclusion of Hispanic women executives' perspectives in an educational curriculum; (c) encourage the development of organizational diversity training programs supporting Hispanic women business leaders; (d) incentivize the implementation of organization-wide cultural change initiatives that invite and retain Hispanic women business leaders; and (e) encourage additional studies of Hispanic women and other underrepresented groups and the use of other research approaches.

In some ways this study is a window into the future because the population from which the sample was drawn is representative of population projections, and as such the successful leadership behaviors of this group could be examples of leadership behaviors needed in the future. This is not to say that we all need to become Hispanic women, although the behaviors characteristic of Hispanics (i.e., passionate and caring) or of women (i.e., intuitive and communicative) are part of who they are, it is important that non-Hispanics remain who they are also. Non-Hispanics need to become more aware of differences in people and cultures, become more skilled in being bicultural, and increase our levels of emotional intelligence; in this way people of all kinds will be able to interrelate better and be more effective leaders—by harnessing the benefits of synergistic behaviors of Hispanic women business leaders.

Conclusions

The momentum of Hispanic population change in the U.S. may fluctuate over the next 4 decades; however, there is agreement as to the projected outcome that Hispanics will become the majority ethnic group in the U.S. by 2060. The social and business

cultural changes affected by these demographics are inevitable and will require leadership.

The purpose of this study was to explore the self-perceptions of these women leaders, without judgment, and to understand how they perceived themselves and their actions as they provided leadership. They have traveled many different roads to get here. These Hispanic women described their experiences through telling stories of their lives, and by reading those stories a person gets to know them better. An underlying theme, I found, was how much they embraced diversity; how much they valued differences in people and believed that differences were good; and how much they cared for others. Do they possess these qualities because they were women? Is it because they were Hispanic? Hispanic women business executives are, “simultaneously Hispanic, women, and leaders” (Sanchez de Valencia, 2008, p. 11). Gender, race, class, and ethnicity add complexity to their lived experience, and this complexity was reflected in the development of leadership related competencies. In this study, I illustrated their perceptions of how being a woman and of how being Hispanic influenced their leadership behavior and organizational effectiveness.

Does gender and ethnicity influence leadership effectiveness? Gender and culture (ethnicity) matter, as gender-role identities and cultural values, influence leadership behavior choices (Ayman & Korabik, 2010). Therefore, if gender and ethnicity influence leaders' behavior, and if that influence extends to creating differences in typical leadership behavior, then gender and ethnicity become determinants of effective leadership. The study of bicultural people, as in this study, provides opportunities to view

cultural diversity in organizations differently by valuing the cultural diversity that exists *within* individuals; as well as, the cultural diversity *between* individuals (Brannen & Thomas, 2010). Participant 7 explained it well:

The advantage of all of that as the world is becoming closer, as we become more globalized, it is a complete advantage because we can live, work, and think in two dimensions so to speak, cultural dimensions, we understand what it is to be in the United States and we acquire a lot of the traits in the experience of the American experience, but we also think and work in our ethnic background, which both of them are very rich, and the management of that just kind of melts together and creates a really good thing, you know, we are always changing, the world is changing, the United States is definitely changing, and the more global that we become I think we enrich ourselves, and our human experience as a whole.

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Appendix A: Letter Requesting Assistance Identifying Participants for a Study

Company Name
Authorizing Representative
Contact Information

Date

Dear Authorizing Representative,

I am a doctoral candidate at Walden University's School of Management. I am requesting your assistance identifying potential participants for a research study entitled "Self-Perceptions of Leadership Effectiveness of Hispanic Women Business Executives." As part of this study, I request that you forward the attached "Letter of Invitation to Participate in a Study" to Hispanic women executives in your company.

Participants will be invited, as one of 15 volunteers from various companies, to participate in a personal interview that will be used in my research. The interviews are being conducted to explore the self-perceptions of leadership effectiveness of Hispanic women business executives in the southeastern region of the United States. The results of the analysis will be used to complete my dissertation, and to offer recommendations that further the advancement of Hispanic women in business executive leadership roles. Their participation will be voluntary and at their own discretion.

The identity of the company, your identity, the identity of participants, and the data collected will remain entirely confidential and may not be provided to anyone outside of the research team without permission from the Walden University Institutional Review Board (IRB).

Please contact me at xxx-xxx-xxxx or via email at xxxxxx.xxxxx@xxxxxxxx.xxx and I will answer any questions that you may have. Thank you for your consideration.

Sincerely,

Daniel R. Dusch Jr.

Appendix B: Letter of Invitation to Participate in a Study

Dear Hispanic Woman Business Executive:

I am a doctoral candidate at Walden University's School of Management. You are invited, as one of 15 self-identified Hispanic women possessing 5 or more years of experience performing business executive-level functions in companies where they did not have a controlling ownership interest, to participate in a personal interview that will be used in my research. The interviews are being conducted to explore the self-perceptions of leadership effectiveness of Hispanic women business executives in the southeastern region of the United States.

The interview is completely voluntary and you may withdraw at any time up until the completion of the dissertation. The interview will be transcribed, coded, and used as a part of my study. The results of the analysis will be used to complete my dissertation, and to offer recommendations that further the advancement of Hispanic women in business executive leadership roles. Your identity will remain confidential and a pseudonym will be used in study reports. You will be provided an executive summary of the findings.

Please contact me at xxx-xxx-xxxx or via email at xxxxxx.xxxxxx@xxxxxxx.xxx and I will answer any questions that you may have. **If you are interested in participating in this study, please reply to xxxxxx.xxxxxx@xxxxxxx.xxx to request a Consent Form that is part of a process called "informed consent" to allow you to understand this study before deciding whether to take part.**

Thank you,

Daniel R. Dusch Jr.

Note: If the participant was contacted directly by the researcher, then the consent form was included, and the last paragraph text replaced with:

Please contact me at xxx-xxx-xxxx or via email at xxxxxx.xxxxxx@xxxxxxx.xxx and I will answer any questions that you may have. **If you agree to participate in this study, please return the attached consent form.**

Appendix C: Consent Form

You are invited to take part in a research study of Hispanic women business executives in the southeastern region of the United States. The researcher is inviting self-identified Hispanic women possessing 5 or more years of experience performing business executive level functions in companies where they did not have a controlling ownership interest to be in the study. This form is part of a process called “informed consent” to allow you to understand this study before deciding whether to take part.

This study is being conducted by a researcher named Daniel R. Dusch Jr., who is a doctoral student at Walden University.

Background Information:

The purpose of this study is to explore the self-perceptions of leadership effectiveness of Hispanic women business executives.

Procedures:

If you agree to be in this study, you will be asked to:

- Return the consent form via e-mail to xxxxxx.xxxxx@xxxxxxxx.xxx.
- Complete a 12-question confidential demographic survey.
- Participate in a face-to-face interview (approximately 2 hours) that will be audio recorded.
- Review the results of the analysis for representative faithfulness; provide comments if desired and confirmation.

Here are some sample questions:

- Tell me about your life as a business executive.
- What is it like being a Hispanic and living in the U.S.?
- Tell me about your understanding and feelings of being a bicultural person.
- Tell me about your interactions with other people’s feelings and emotions.
- Tell me about your leadership style.
- Tell me about your most successful and gratifying leadership experience.
- Tell me about your least successful and gratifying leadership experience.
- Tell me about how you implement your leadership style to achieve the most effective outcome.
- What are the most misunderstood aspects of your leadership? Which leadership behaviors are most misunderstood?
- Tell me about the differences you see if any, between the ways your company perceives your effectiveness vs. your perceptions of your effectiveness, and give me some examples.
- What changes do you feel could be made that would increase the company’s understanding of the capabilities of Hispanic women leaders, and would foster a

greater appreciation for their competencies and potential contributions to organizational effectiveness?

Voluntary Nature of the Study:

This study is voluntary. Everyone will respect your decision of whether or not you choose to be in the study. If you decide to join the study now, you can still change your mind during or after the study. You may withdraw at any time up until the completion of the dissertation.

Risks and Benefits of Being in the Study:

Being in this type of study involves some risk of the minor discomforts that can be encountered in daily life, such as unintended disclosure of information and psychological stress.

The benefits of the study (reflecting your responses) are realized by addressing gaps in the literature regarding Hispanic women business executives and gaining better insight into factors of leadership based upon your lived experiences.

Payment:

Study participants will receive a \$25 coffee gift card and an executive summary of the findings by email.

Privacy:

Any information you provide will be kept confidential. The researcher will not use your personal information for any purposes outside of this research project. Also, the researcher will not include your name or anything else that could identify you in the study reports. Data will be kept secure by using password protected files. Data will be kept for a period of at least 5 years, as required by the university.

Contacts and Questions:

You may ask any questions you have now. Or if you have questions later, you may contact the researcher at xxx-xxx-xxxx or via email at xxxxxx.xxxxxx@xxxxxxxx.xxx. If you want to talk privately about your rights as a participant, you can call Dr. Leilani Endicott. She is the Walden University representative who can discuss this with you. Her phone number is x-xxx-xxx-xxxx, extension xxxxxxxx. Walden University's approval number for this study is 01-07-14-0023318 and it expires on January 6, 2015.

The researcher will give you a copy of this form to keep.

Statement of Consent:

I have read the above information and I feel I understand the study well enough to make a decision about my involvement. By replying to this email with the words, "I consent", I understand that I am agreeing to the terms described above.

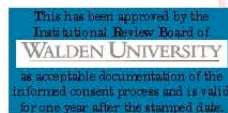
Printed Name of Participant

Date of consent

Participant's Signature

Printed Name of Researcher

Researcher's Signature



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Appendix D: Confidential Demographic Survey

Research Study: Self-Perceptions of Leadership Effectiveness of Hispanic Women
Business Executives

Interviewer: Daniel R. Dusch, Jr.

Interviewee Code: _____

Date: _____

Work Hours per Week _____

Number of Years in Current Position _____

Number of Direct Reports _____

Number of People in Your Organization/Department _____

What Business Functions does Your Organization Perform (i.e., planning, billing and
collections, accounting, finance, sales, internal audit, etc.) _____

Number of Business Executive Positions Held (lifetime total) _____

Number of Years as a Business Executive (lifetime total) _____

How Long Since Your Last Leadership Skills/Style Assessment (if applicable):

Never _____; 0 to 3 yrs. _____; 4 to 7 yrs. _____; greater than 7 yrs. _____

Type of Company in Current Position (check all that apply):

Fortune 1000 _____; Hispanic Business 500 _____; Other Publicly Held _____;

Private _____; Domestic _____; Foreign _____; Multinational _____

Do you enjoy your work? Yes _____; No _____; Indifferent _____

Do you feel secure in your employment? Yes _____; No _____; Not Sure _____

Appendix E: Interview Frequently Used Terminology

Bicultural: Refers to individuals that have been born into or acquired more than one cultural schema. The concept and terminology are not limited to only two cultures, but can include three or more cultures (Brannen & Thomas, 2010).

Bicultural competence: Cultural knowledge and cross-cultural abilities that are used to interact effectively with others in cross-cultural contexts by individuals who have been exposed, and have internalized two or more cultures, and operationalize a bidimensional or two-directional dynamic process between the dominant culture and nondominant culture(s) (Benet-Martinez, Leu, Lee, & Morris, 2002; Hong, 2010; Hong, Morris, Chiu, & Benet-Martínez, 2000; Nguyen & Benet-Martinez, 2007, 2013).

Emotional intelligence: The capacity to solve problems through the management of one's own emotions and those of others (Corona, 2010; Mayer & Salovey, 1993; Mayer, Salovey, & Caruso, 2004; Salovey & Mayer, 1990).

Hispanic: The U. S. Census Bureau (2014) categorized Hispanic as Mexican, Mexican American, Chicano, Puerto Rican, Cuban, or of another Hispanic, Latino, or Spanish origin. Additionally, people of Hispanic, Latino, or Spanish origin may be of any race.

Intersectionality: Refers to a theoretical and methodological approach to inequality. Intersectionality presupposes that categories of structural inequities (i.e., gender, race, class, ethnicity, etc.) intersect and produce complex relationships and emphasizes the “nonadditive effects of multiple forms of oppression” (Choo & Ferree, 2010, p. 132).

Leadership: “A process of motivating people to work together collaboratively to accomplish great things” (Vroom & Jago, 2007, p. 18): Furthermore, (a) leadership is a process; (b) influence is achieved through the motivation of others; (c) the nature of incentives are not part of the definition; (d) the result of influence is a collaboration towards the achievement of a common goal, and (e) the common goal shared by the leader and followers may not necessarily be considered desirable by all other parties.

Leadership styles:

- Autocratic leader: High task orientation – Low relationship orientation; Clearly states performance/reward expectations of coworkers and with a management focus on mistakes, deviations, and exceptions.
- Participative leader: High relationship orientation – Low task orientation; Instills pride and a sense of purpose in coworkers, articulates vision, seeks others’ perspectives to solve problems, is a teacher and coach.
- Laissez-Faire leader: Low task orientation – Low relationship orientation; Frequent absence or lack of involvement in decision making, delays responding to inquiries and important requests, embraces a “if it is not broken, then don’t fix it” approach (Bass & Riggio, 2006).

Leadership types:

- Transactional leadership: Leaders and followers exchange one thing for another in a transaction based relationship such as jobs for votes, pay for performance, cabinet appointments for campaign contributions, etc. (Burns, 2010).

- Transformational leadership: Leadership that promises the fulfillment of the higher values held by followers and had the potential to transform them into leaders; where moral purpose of the leader and follower is a factor in transforming leadership processes (Burns, 2010; Komives, Lucas, & McMahon, 1998).

Organization: A combination of authority relations including governance structures, goals, technologies, and client markets (Baum & Rao, 2004).

Organizational effectiveness: Relates to how well an organization can achieve its goals (Chi, Lan, & Dorjgotov, 2012; Lusthaus, Adrien, Anderson, Carden, & Montalvan, 2002; Lusthaus, Anderson, & Adrien, 1997).

Self-efficacy: “Is concerned not with the number of skills you have, but with what you believe you can do with what you have under a variety of circumstances” (Bandura, 1997, p. 37).

Appendix F: Interview Guide

Research Study: Self-Perceptions of Leadership Effectiveness of Hispanic Women Business Executives

Interviewer: Daniel R. Dusch, Jr.

Interviewee Code: _____

Interview Date: _____ Time: Start _____ End _____

Phase 1-Lived Business Experiences

1. Tell me about your life as a business executive:
 - a. What was it like when you were first deciding to become an executive?
 - b. Tell me about some of the difficulties or advantages you felt while getting adjusted to your new role at work, and give me some examples.
 - c. Tell me about how your changing professional role influenced any changes in your personal life.

2. Tell me about your lived experiences from an intersectionality perspective (i.e., race, gender, class, ethnicity):
 - a. Tell me about the way you are treated as a Hispanic woman at work.
 - b. Tell me about the differences you see if any, between the way you are treated vs. the way others are treated, and give me some examples.
 - c. If you are treated differently, does it affect you positively or negatively?
 - d. If you are treated differently, do you feel it is because you are Hispanic, a woman, both, or other factors?
 - e. How do you feel that living with the diversity and the complexity of being a Hispanic woman (i.e., intersectionality) enhances or diminishes your effectiveness as a *business executive*, and give me some examples.

3. What is it like being a Hispanic and living in the United States?
 - a. How long have you lived here? Where else in the U.S. have you lived? Have you always lived in the U.S.?
 - b. Tell me about your cultural setting at home and at work (multiple choice question):

Home	Work
i. Hispanic	Hispanic
ii. Hispanic	Non-Hispanic
iii. Non-Hispanic	Non-Hispanic
iv. Non-Hispanic	Hispanic
v. Hispanic	Mixed

- | | |
|--------------------|--------------|
| vi. Mixed | Hispanic |
| vii. Mixed | Mixed |
| viii. Non-Hispanic | Mixed |
| ix. Mixed | Non-Hispanic |
- c. Tell me about your understanding and feelings of being a bicultural person.
 - d. How is being a bicultural person an advantage and disadvantage, and give me some examples.
 - e. How do you feel that the capacity to navigate more than one culture effectively (i.e., bicultural competence) enhances or diminishes your effectiveness as a *business executive*, and give me some examples.
4. Tell me about your interactions with other people's feelings and emotions:
 - a. How well do you manage your feelings and emotions?
 - b. Tell me about how sensitive you are to other people's feelings and emotions.
 - c. Tell me how you incorporate your emotions and the emotions of others into solving problems and achieving common goals.
 - d. Tell me about the differences if any, you see between your emotional interactions with people vs. other peoples' emotional interactions with one another, and give me some examples.
 - e. Tell me if you feel the differences you see if any, are because you are Hispanic, a woman, both, or other factors.
 - f. How do you feel that the capacity to direct your emotions and the emotions of others to solve problems constructively (i.e., emotional intelligence) enhances or diminishes your effectiveness as a *business executive*, and give me some examples.

Phase 2-Leadership Self-perceptions

5. Tell me about your leadership style:
 - a. Do you perceive yourself as mostly an autocratic leader, participative leader, or laissez-faire leader, and why.
 - b. What was your leadership style based upon your most recent leadership survey (if applicable)?
 - c. Tell me about the differences if any, between the survey results and your perceptions of your leadership style (if applicable).
 - d. Tell me about the differences you see if any, between your leadership style vs. other executives you work with, and give me some examples.
6. Tell me about how you enact leadership:

- a. Do you consider yourself (a) a transactional leader whose focus is on task completion, (b) a transformational leader whose focus is on developing relationships, or (c) something in between, and why?
 - b. Tell me about your most successful and gratifying leadership experience:
 - i. When something did *not* go according to plan how did you resolve it? Describe your interactions between yourself and direct reports, yourself and peers, yourself and boss.
 - c. Tell me about your least successful and gratifying leadership experience:
 - i. When something did *not* go according to plan how did you resolve it? Describe your interactions between yourself and direct reports, yourself and peers, yourself and boss.
 - d. Tell me about the differences you see if any, between the ways you interacted with others in a favorable situation vs. the ways you interacted with others in an unfavorable situation, and give me some examples.
7. Tell me about how you implement your leadership style to achieve the most effective outcome:
- a. How do you implement your leadership style for different people, and give me some examples.
 - b. How do you implement your leadership style in different situations, and give me some examples.
 - c. What are your perceptions regarding the best way to lead (multiple choice question):
 - i. There is one-best-way to lead, and it should be followed for all people and in all situations.
 - ii. There is one-best-way to lead, but its application might vary according to the needs of the person(s) and the situation.
 - iii. There is not one-best-way to lead, and the leadership style is contingent upon the situation (i.e., the leadership style changes based upon the situation).
8. Tell me about any models of leadership that you embrace or normative (i.e., prescriptive) models that you use when making leadership choices (i.e., decision making).
9. Do you feel that your self-efficacy is high, low, or somewhere between the two?
10. Tell me about how your self-efficacy contributes to your success as a leader if any.
11. How do you feel that intersectionality enhances or diminishes your *leadership effectiveness*, and give me some examples.
12. How do you feel that bicultural competence enhances or diminishes your *leadership effectiveness*, and give me some examples.
13. How do you feel that emotional intelligence enhances or diminishes your *leadership effectiveness*, and give me some examples.

Phase 3-Organizational Effectiveness

14. Tell me about your organizational role in your current position:
 - a. Tell me about your operational responsibilities.
 - b. Tell me about how you fit in with the other executives.
 - c. What is your level of involvement with the executive team when making business decisions?
 - d. Would you characterize your company culture as Hispanic, non-Hispanic, or multicultural?
 - e. Tell me about your organization's workforce diversity (i.e., race, gender, class, ethnicity, nationality) and what are your organization's attitudes towards diversity.
 - f. Tell me about the differences you see if any, between your organization's words and your organization's practices regarding attitudes towards diversity, and give me some examples.
15. Tell me about how effectiveness is measured in your company:
 - a. How is your effectiveness measured in terms of employee engagement?
 - b. How is your effectiveness measured in terms of task performance?
 - c. How is your effectiveness measured in terms of operational outcomes?
 - d. How is your overall effectiveness measured?
16. Tell me about the differences you see if any, between the ways your company perceives your effectiveness vs. your perceptions of your effectiveness, and give me some examples.
17. If these differences occur, tell me about why you feel that these differences in perceptions of effectiveness occur.
18. What are the most misunderstood aspects of your leadership? Which leadership behaviors are most misunderstood?
19. Do you feel that the company's perceptions (i.e., assumptions) regarding a Hispanic woman's leadership behaviors enhance, diminish, or have no effect on the company's perceptions of your organizational effectiveness.
20. How do you feel that intersectionality enhances or diminishes your *organizational effectiveness*, and give me some examples.
21. How do you feel that bicultural competence enhances or diminishes your *organizational effectiveness*, and give me some examples.
22. How do you feel that emotional intelligence enhances or diminishes your *organizational effectiveness*, and give me some examples.
23. What are at least three of the most important contributions to organizational effectiveness that you make as an organization leader?
24. What changes do you feel could be made that would increase the company's understanding of the capabilities of Hispanic women leaders, and would foster a

greater appreciation for their competencies and potential contributions to organizational effectiveness?

25. What advice would you give to young Hispanic women who might be considering business executive leadership as a career path?
26. Tell me about any other experiences, events, or situations that have influenced your development as a business executive and effective organizational leader.

End

Appendix G: Detailed Coding and Thematic Mapping

Overarching Research Question	Research Question	Superordinate Theme	Theme	Subtheme
D0000	Overarching Research Question: What are the lived business experiences of Hispanic women executives regarding leadership effectiveness?			
D1000	Research Question 1: Which leadership competencies and behaviors, acquired through the lived experiences of being a Hispanic woman business executive, do the group members have in common?			
D1100	Early Lived Experiences With Diversity			
	D1110 Experiences Growing-up in Different Places			
	D1120 Cultural Setting At Home And Work			
D1200	Lived Experience And Becoming/Being A Business Executive			
	D1210 Becoming An Executive			
	D1211 New Professional Role			
	D1212 Role Models Mentors And Behaviors For Me			
	D1213 Role Models Mentors And Behaviors For Others			
	D1214 Intentionality-I Planned It-I Worked At It			
	D1215 Serendipity-I Didn't Plan It-It Just Happened			
	D1216 Self-Identity And Individualism			
	D1217 Self-Image And Stereotypes			
	D1220 Impact On Personal Life			
	D1221 Relationships And Responsibilities			
	D1222 Work-Life Balance			
	D1230 Differences In Treatment			
	D1231 Ethnicity-Gender-Both			
	D1232 Other Factors			
	D1240 Being A Bicultural Person			
	D1241 Understanding And Feelings Of Being Bicultural			
	D1242 Advantages And Disadvantages Of Being Bicultural			
	D1250 Emotional Intelligence			
	D1251 Sensitivity To Feelings and Emotions			
	D1252 Incorporating Emotions To Solve Problems And Achieve Common Goals			
D1300	Other Experiences-Events-Situations That Influenced You			
D14A0	Acquired Competencies As Factors In Business Executive Effectiveness			
	D14A1 Lived Experience: Business Executive Effectiveness And Intersectionality			
	D14A2 Lived Experience: Business Executive Effectiveness And Bicultural Competence			
	D14A3 Lived Experience: Business Executive Effectiveness And Emotional Intelligence			

D2000 Research Question 2: What are Hispanic women business executives' perceptions of their leadership style?

D2100 Self-Perceptions Of Leadership Style

D2110 What Is Your Leadership Style

D2120 Your Leadership Style vs. Other Executives You Work With

D2130 Achieving The Most Effective Outcomes

D2131 Implementing Your Leadership Style For Different People

D2132 Implementing Your Leadership Style In Different Situations

D2140 Best Way To Lead

D2150 Models Used In Leadership And For Decision Making

D3000 Research Question 3: What are Hispanic women business executives' perceptions of the ways that leadership is enacted by them?

D3100 Self-Perceptions Of Leadership Behavior (Enactment)

D3110 What Are Your Leadership Behaviors (Enactment)

D3111 Transactional, Transformational, Or In Between

D3112 Leadership Behavior In Favorable vs. Unfavorable Situations

D3120 Misunderstood Aspects Of Leadership Behavior

D3130 Self-Efficacy And Success As A Leader

D4000 Contributing Factors In Leadership Effectiveness

D41A0 Contributing Factors In Leadership Effectiveness

D41A1 Self-Perceptions Of Leadership Effectiveness And Intersectionality

D41A2 Self-Perceptions Of Leadership Effectiveness And Bicultural Competence

D41A3 Self-Perceptions Of Leadership Effectiveness And Emotional Intelligence

D5000 Research Question 4: What are Hispanic women business executives' perceived contributions to organizational effectiveness?

D5100 Perceived Contributions To Organizational Effectiveness

D5110 Organizational Role

D5120 Operational Responsibilities

D5130 Level Of Involvement With The Executive Team And Business Decisions

D5140 Organization's Workforce Diversity-Attitudes Towards Diversity

D5150 How Effectiveness Is Measured In Your Company

D5151 Your Effectiveness In Terms Of Employee Engagement

D5152 Your Effectiveness In Terms Of Task Performance

D5153 Your Effectiveness In Terms Of Operational Outcomes

D5154 Your Overall Effectiveness

D5170 Company's Perception Of Effectiveness vs. Your Perceptions Of Effectiveness

-
- D5180 Effects Of Company's Perceptions (Assumptions) Of Hispanic Women's Leadership Behaviors
 - D5190 Self-Perceptions Of Contributions To Organizational Effectiveness
 - D52A0 Contributing Factors In Organizational Effectiveness
 - D52A1 Organizational Effectiveness And Intersectionality
 - D52A2 Organizational Effectiveness And Bicultural Competence
 - D52A3 Organizational Effectiveness And Emotional Intelligence
 - D6000 Effecting Positive Social Change
 - D6110 Advice To Young Hispanic Women Considering Business Executive Leadership
 - D6120 Opportunities For Social Policy And Organizational Change
-

Note. Detailed coding and thematic mapping was extracted from NVivo 10 and reformatted. Not all themes were used in the final table of themes for the group.

Curriculum Vitae

DANIEL R. DUSCH, JR.

PERSONAL PROFILE

The most memorable aspects of my experiences have been the relationships and friendships developed with the people in my professional and personal life. My business experiences have allowed me to develop key skills for teaching; while leading teams with diverse backgrounds and competencies has taught me to be respectful of individuals and conscious of varying individual learning styles and abilities. I look forward to integrating my academic and business experiences to facilitate positive learning experiences, improve leadership and operational outcomes, and effect positive social change in education, business, and politics.

ACADEMIC BACKGROUND

Ph.D. in Applied Management and Decision Sciences (AMDS), expected February, 2015
Walden University, Minneapolis, MN. Dissertation topic: Self-Perceptions of Leadership Effectiveness of Hispanic Women Business Executives. Dr. Joseph Barbeau (Chairperson)

Master of Science in Taxation (MST) (Concentration in multinational tax considerations), August, 2000 Seton Hall University, South Orange, NJ

Bachelor of Science in Accounting (Minor in business), May, 1989 University of Pittsburgh, Pittsburgh, PA

RESEARCH INTERESTS

I have always believed that it is much harder to create something simple than it is to create something complicated, and so in my professional work I strived to explain abstractions or complex processes in simple terms. This concept helped when leading change management teams and creating a shared vision. I try to follow that philosophy in all aspects of life.

Perceptions of leadership are of interest to me demonstrated by my dissertation topic: Self-Perception of Leadership Effectiveness of Hispanic Women Business Executives. However, leadership is only one aspect of the broad scope of Applied Management and Decision Science (AMDS). My research interests include the study of barriers to communication, interpersonal dynamics of group decision making, decision-making models that help people make better decisions, and behaviors that diminish or lead to failed leadership.

Young professionals need to understand future expectations, of them, by using leadership and communicating methods that they embrace and understand. I have a keen interest in teaching and developing a bridge between academic theory and my business experience, and in doing so, opening new opportunities for research. Topics include perceptions of leadership styles and behaviors, perceptions of leadership and organizational effectiveness, and matching the situation with the appropriate decision-making model to improve decision outcomes.

PROFESSIONAL EXPERIENCE

AT&T Corporate Headquarters New Jersey **1990-2005**
www.att.com

AT&T Corporate Consolidation **2003-2005**

- Ensured accuracy and reasonableness of AT&T's consolidated corporate financial statements by reviewing and confirming key performance indicators during bookclose/year-end processes and including verification of Earnings per Share, Retained Earnings, and Federal Tax calculations.
- Conducted FAS 115, FAS 133, and Other Income analysis providing narratives for internal and external reporting on a monthly/annual basis.
- Performed monthly/annual financial statement variance analyses for selected operating units.
- Developed annual seminars and provided training to accounting/financial professionals enabling timely submission of accurate information for inclusion in AT&T's Annual Report to Shareholders and SEC filings. Prepared SEC information. Ensured Sarbanes-Oxley compliance.

AT&T Corporate Controllers Change Management **1997-2003**

- Change leadership visionary: providing training, improving procedures and delivering on-time results.
- Reduced data processing time 50% while improving accuracy by reengineering the corporate transfer/restatement process to expedite reporting of organizational restructurings, acquisitions, and spin-offs.
- Developed corporate wide solutions and corresponding training to resolve complex accounting and financial reporting issues and overcome system constraints associated with corporate spin-offs, mergers, and acquisitions.
- Managed restatement process operations leading change management teams up to 20 people, facilitating group decision-making, providing individual and group training, and ensuring optimum resource allocation and project success.

AT&T Communications Services Headquarters **1995-1997**

- Provided corporate oversight of general ledger accounting, bookclose entries, and monthly/year-end close processes.

- Directed general ledger and financial reporting restatement operations enabling proper representation of restated financial results in accordance with GAAP.
- Project managed the successful completion/implementation of AT&T's accounting/financial systems restructuring following NCR, Lucent, and Capital Corporation spin-offs.

AT&T Professional Development Program **1990-1995**

Completed multiple rotations across various organizations:

- | | |
|----------------------------------------------------------------|-----------|
| ▪ AT&T Regulatory Controllers | 1993-1995 |
| ▪ Consumer Communication Services Chief Financial Organization | 1992-1993 |
| ▪ Business Communication Services Chief Financial Organization | 1991-1992 |
| ▪ Business Communication Services Controllers | 1990-1991 |

CERTIFICATIONS

- New Jersey Certified Public Accountant 10/29/2001 to 12/31/2011
- National Association of Securities Dealers Series 6 Certification (inactive)
- Six Sigma Green Belt

ACTIVITIES/MEMBERSHIPS

Academy of Management (AOM) Member since 2009

Reviewer for the 2015 Annual Meeting of the Academy of Management

European Group for Organizational Studies (EGOS) Member since 2009

International Association for Business and Society (IABS) Member since 2009

Organizational Behavior Teaching Society (OBTS) Member since 2009

Founder: JRPG Just Regular People Group <http://www.justregularpeoplegroup.org>

Treasurer & Board Member, Fountainhead Foundation 1994-1995