GENERATIONAL AND EXPERIENTIAL DIFFERENCES OF LEADERS

IN THE INTELLECTUAL AND DEVELOPMENTAL DISABILITIES

SERVICES SECTOR

by

Caitlin Elizabeth Bailey

A dissertation submitted to the Faculty of the University of Delaware in partial fulfillment of the requirements for the degree of Doctor of Philosophy in Human Development and Family Sciences.

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ABSTRACT

To date, there are few empirical studies of leadership specific to the intellectual and developmental disabilities (IDD) service sector. In particular, little is known about how IDD service sector leaders approach and behave in their leadership roles. The dearth of leadership focus leaves a significant gap in knowledge about the skills and practices of IDD service sector leaders. The current study serves two purposes intended to bridge this knowledge gap. First, this project enhances the focus on leadership behaviors in literature grounded in services for people with IDD and their families. Second, the study explores the effect of generational membership and the amount of professional field experience on the behaviors of IDD service sector leaders. Generational differences in IDD service sector leaders is a nonexistent topic in current literature. However, as policies and services for people with IDD and their families continue to evolve, over time leaders have had to adopt fundamentally different skills and behaviors to ensure responsive supports. Information about generational and experiential differences of IDD service sector leaders will inform researchers, trainers, and practitioners about the leadership skills necessary to effectively support people with IDD and their families. Results from two one way MANOVAs and follow up discriminant function analyses indicated a significant effect for generation on personal leadership behaviors. However, due to a small effect size and unstable classification rates, these results should be considered with caution. No significant differences were found for leaders' experience in the IDD service sector. The implications of these findings were discussed as they relate to the changing IDD service sector, the direct support workforce shortage and the lack of leadership investment across the IDD services sector

Chapter 1

INTRODUCTION

1.1 Problem Statement

Leaders play a critical role in providing quality services and supports for people with intellectual and developmental disabilities (IDD) and their families (Parish, 2005; Thompson-Brady, Fong, Waninger, & Eidelman, 2009). People with disabilities and their families depend on IDD service sector leaders to design, develop, and implement policies and services that are responsive and respectful to their wants and needs. However, disability scholars have rarely designed studies that make explicit the connection between the leadership practices of IDD service sector professionals and the quality of services offered (Amado, Stancliffe, McCarron, & McCallion, 2013; Bigby & Wiesel, 2014; Friedman, 2019). To date, little research exists that examines the traits and practices of IDD service sector leaders.

This dearth of research leaves an empirical void in disability studies. It is essential to identify and investigate the leadership skills, characteristics, and behaviors that lead to quality services for people with disabilities and their families. It is particularly essential because leadership is a developable skill (Avolio & Gardner, 2005; Bennis, 2007). As such, understanding IDD service sector leaders' behaviors can inform efforts such as research, training, technical assistance, and support offered to current and emerging leaders.

While there are several approaches to the study of leadership that would enhance disabilities scholarship, one timely topic is the study of generational differences in leadership behaviors and practices. The exploration of generational differences in leadership styles, skills and practices has become a common focus of academic research and literature, media and business and organizational management literature (Anderson, Baur, Griffith, & Buckley, 2017; Arsenault, 2004; Costanza, Badger, Fraser, Severt, & Gade, 2012; Rudolph, Rauvola, & Zacher, 2018; Rudolph & Zacher, 2017). Conversely, little is known about the generational differences of leaders who work in the human services sector (Lyons, Duxbury, & Higgins, 2006; Wailand, 2015). This is particularly true within the intellectual and developmental disabilities service sector.

Several contextual factors currently impacting the IDD service sector make the topic of generation particularly pertinent to the current and future of quality of services available to people with disabilities and their families:

1. Services and supports for people with intellectual and developmental disabilities continue to shift away from institutional and congregate service models that segregate and control people, to flexible, individualized services that support people to control their own lives (Bradley & Knoll, 1995; Larson et al., 2018). To respond to this shift, emerging and future organizational leaders require fundamentally different skills to lead IDD service sector agencies than their predecessors.

2. There is a growing leadership gap in the nonprofit sector, of which the IDD service sector is a part. This gap is due to the aging and the planned retirement of the baby boom generation (Annie E. Casey

Foundation, 2004; Pew Research Center, 2010), as well as the lack of investment in succession planning and leadership development of the next generation of top organizational leaders (Landles-Cobb, Kramer, & Milway, 2015; Larcker & Miles, 2010). There is also anecdotal evidence and limited research (Foster-Fishman, Jimenez, Valenti, & Kelley, 2007; Thompson-Brady et al., 2009) supporting these findings in the IDD service sector, specifically.

3. Finally, the growing direct support workforce shortage contributes to the complexity of the leadership gap. As a new generation of intellectual and developmental disability services sector professionals move into top leadership roles, they face a rising workforce shortage (Presidents Committee for People with Intellectual Disabilities (PCPIDD), 2017). Ultimately, the direct support workforce shortage threatens the quality of services and supports for people with IDD and their families (Hewitt & Larson, 2007; PCPID, 2017).

This study contributes to the knowledge about IDD service sector leaders' behaviors and practices as they lead agencies that provide, regulate, and advocate for services for people with intellectual and developmental disabilities and their families. Ultimately, understanding generational differences in leadership styles and practices will help researchers, trainers, and organizational leaders know how to develop and prepare emerging and future leaders to succeed in the face of changes and challenges impacting the IDD services sector.

1.2 Issues and Background: Connecting Leadership and Quality Services and Supports for People With Intellectual and Developmental Disabilities and Their Families

Leaders can be catalysts or barriers to quality services and supports for people with disabilities and their families (Bigby & Beadle Brown, 2018; Parish, 2005; Schalock & Verdugo, 2013; Thompson-Brady et al., 2009). Although there is very little research exploring the characteristics, skills, practices, and values of leaders working in the IDD services sector, existing research demonstrates the importance of including leadership as a topic of study in disability services scholarship. For instance, research conducted at the organizational- (Walker, P., 1993) and systems-level (Agranoff, 2013; Parish, 2005) has shown that leadership is an essential factor in the successful transformation from traditional, congregate services to individualized, community-based supports for people with disabilities. Research has also demonstrated that leaders are essential to the successful implementation of quality, person- and family-centered services (Bailey & Gilden, 2018; Bigby & Beadle-Brown, 2018).

Recently, studies have found that previously used predictors of quality lives for people with IDD are necessary but insufficient to the achievement of quality outcomes (Bigby & Beadle Brown, 2018; Friedman, 2019). For instance, Friedman (2019) demonstrated that even when people with disabilities access individualized and community-based services that were designed to support them to control their services and lives, many still lack access to meaningful community connections and relationships. Several studies from the United Kingdom had similar findings (Beadle-Brown et al., 2012; Bigby & Beadle-Brown, 2018; Mansell, 2006); community-based services alone did not increase a person's opportunities to make meaningful life

choices. These findings indicate that other factors, such as leadership practices, are critical variates that impact service quality (further explored in Chapter Two).

Findings, such as those listed above, have also inspired disability scholars to recommend more studies that focus on the experiences and practices of service sector leaders (e.g., Amado et al., 2013; Schalock & Verdugo, 2013; Thompson-Brady et al., 2009). For example, in their discussion of organizational transformation in the IDD service sector, Schalock and Verdugo (2013) determined that leaders are primary facilitators for change. They noted that it is essential to understand how leaders perceive their role in assuring positive organizational practices and quality services.

The skills and practices of leaders working in organizations that provide, regulate, research, and advocate on behalf of people with intellectual and developmental disabilities and their families directly impact the quality of services available to them. As such, this study seeks to alleviate an information gap in current literature by exploring the characteristics and practices of IDD sector leaders to understand their behaviors and practices.

1.3 Issues and Background: Contextual Factors Impacting Current and Future Intellectual and Developmental Disabilities Service Sector Leaders

1.3.1 Disability Rights Movement

Over the past several decades, there has been a significant transformation in the United States intellectual and developmental disabilities service sector. Changes impacting this notable transformation have included enhanced societal beliefs about the humanity and rights to citizenship of people with intellectual and developmental disabilities and the evolution of type and quality of services and supports available to

them. Two concurrent movements have driven these changes over time, the Disability Rights Movement and the subsequent deinstitutionalization and community-based transformation of the IDD services sector.

In the last century, disability rights activists in the United States have fought for the civil and human rights of people with intellectual and developmental disabilities. Early disability rights activism generally focused on recognition of disability in medical communities, assuring people with disabilities and their families had access to services and supports. In the past several decades, the Disability Rights Movement has continued to evolve. Today efforts focus more on community integration, belonging.

At their core, these efforts have relied on the tireless leadership of people with disabilities and their families, and allies committed to the inalienable civil and human rights of people with disabilities. Continued change depends on the skills and practices of current and future IDD service sector leaders. These leaders will carry out a vision of human rights through the provision, regulation, and advocacy of services for people with IDD and their families.

1.3.2 Policy Changes Impacting People With IDD and their Families

The Disability Rights Movement has compelled a shift in policies and regulations that impact people with IDD and their families. In general, these changes have been marked by policies and legislation that are designed to support people to realize their fundamental human rights. For instance, Americans with Disabilities Act (ADA; 1990) was seminal legislation that wrote the rights of people with IDD into law. Signed into federal law in 1990, The Americans with Disabilities Act marked a historical turning point in the social and political understanding and treatment of

people with intellectual and developmental disabilities in the United States (Silverstein, 2000; Turnbull, Summers, Lee, & Kyzar, 2007).

With an overarching vision of inclusion and acceptance, the ADA framed how American governments, businesses, and organizations are mandated to treat people with disabilities. The act called for nondiscrimination and implementation of supports that ensure people with intellectual and developmental disabilities have the most control over their lives and services possible (Silverstein, 2000). The passage of the Americans With Disabilities Act in 1990 also marked a shift in the conceptualization and regulation of inclusion for people with intellectual and developmental disabilities from physical inclusion to social inclusion (Carter, Satcher, & Coelho, 2013; Minnesota Governor's Council on Developmental Disabilities, 2019; Turnbull et al., 2007).

The 1999 Supreme Court decision, Olmstead vs. LC (1999), is also important to discuss as it was the first supreme court case to interpret the boundaries of integration, mandated by the ADA, and rule in favor of people with disabilities. Specifically, the case involved two women with intellectual disabilities who were confined to an institutional setting in Georgia, although they requested access to community-based services. The state of Georgia argued that providing immediate release from the state hospital and subsequent services would "fundamentally alter the state's programs," thus rendering the community-based services "unreasonable provisions" (Zimring et al., 2008, p. 2). The court sided with the two women, dismissed the state's claim, and mandated immediate transfer of the women to community residences.

The Olmstead decision inspired more advocates to insist that their rights be recognized. The decision set a precedent for several subsequent court cases, many of which also ruled favor of the integration of people with disabilities into their chosen communities (e.g., Ligas vs. Maram, 2005; United States v. Georgia, 2010). The Olmstead decision was also a contributing factor to the recent deinstitutionalization movement; according to Cerreto (2001), it was "the Brown vs. Board of Education for disability rights " (p. 47).

1.3.3   Service Changes Impacting People With IDD and Their Families

These social and political advancements have driven significant changes in the services and supports available to people with disabilities and their families. Overall, real and meaningful community inclusion and participation, self-determination, access to healthcare and employment have characterized the most significant strides in service improvement (Hiersteiner, Bershadsky, Bonardi, & Butterworth, 2016; Hill, Wehman, Kregel, Banks, & Meltzer, 1987; Lakin & Stancliffe, 2007).

For instance, increases in deinstitutionalization and community-based services advanced meaningful community inclusion over time. The number of people living in institutions (including state-operated facilities and nursing homes) has decreased from approximately 275,000 people with IDD in 1960 to less than 50,000 in 2015 (Larson et al., 2018). Today, only 13% of people with IDD receiving formal services currently live in supervised residential settings, while the remaining 87% live with a family caregiver, alone or with a roommate (Braddock, Hemp, Tanis, Wu, & Haffer, 2017).

Further, the 1981 authorization of the Home and Community-Based Services (HCBS) Waiver Program amplified access to community-based services. The HCBS Waiver Program allowed states to use Medicaid funds to provide services in peoples'

homes and communities (Braddock et al., 2017). The use of HCBS services has proliferated, such that in 2016, 57% of all Medicaid long term care spending (for people with disabilities and the elderly) went to home and community waivers (Eiken, Sredl, Burwell, & Amos, 2018). Utilization continues to grow each year; recent figures show that 741,285 people received HCBS Waiver services in 2014 (Braddock et al., 2017).

Some leaders working in agencies that provide services directly to people with IDD have advocated for this shift from congregate, institutional models to flexible, individualized supports. Still, others have been forced to respond. Either way, changes brought about by this shift have required leaders to adopt fundamentally different values, skills, and behaviors than their predecessors. Specific skills are needed to transform their models, practices, and locations to support people in their chosen homes and communities. Research about IDD service sector leaders will provide valuable insight into the training, research, and technical assistance needed to ensure that future leaders succeed in a continuously changing service sector.

1.3.4   Direct Support Workforce Shortage

Another issue that current and future leaders in the IDD services sector must address is a growing direct support workforce shortage. Due to compounding factors, including demographic and economic trends, low compensation rates, and lack of appreciation and support for direct support professionals (DSPs), the growth in demand for direct services is severely outpacing the growth of the direct support workforce (Espinoza, 2017; PCPID, 2017).

In the United States, of the estimated five million people with intellectual and developmental disabilities (Larson et al., 2001, approximately 1.4 million are

receiving or waiting to receive formal services (Anderson et al., 2016). Most people with IDD live with and receive support from family members (Braddock et al., 2017); parents tend to be primary caregivers. The need for formal services will increase substantially as the number of aging parents continues to grow. Additionally, the fact that people with IDD continue to live longer due to medical advancements and more access to quality healthcare services further compounds the issue (CMS National Direct Service Workforce Resource Center, 2008; PCPID, 2017). Instead of necessary growth, the IDD services sector workforce is shrinking. In 2015, the workforce experienced DSP turnover rates averaging 45.5% and vacancy rates averaging 9% (Hiersteiner, 2016).

The need for workforce growth is not unique to the IDD service sector, however (Espinoza, 2017). The rapidly growing population of people who are aging (Favreault & Dey, 2016) is also putting tremendous pressure on the direct support workforce. Favreault and Dey (2016) estimate that 52% of Americans turning 65 will require long term services and supports in the future.

Addressing the workforce shortage is also personally critical to people with intellectual and developmental disabilities, as DSP retention is a crucial indicator of quality-life outcomes (Abbot & McConkey, 2006; Friedman, 2018). For example, studies have found that Direct Support Professionals are often primary facilitators of community access and integration (Abbot & McConkey, 2006; Friedman, 2018; Venema, Otten, & Vlaskamp, 2015) as well as significant deterrents of institutionalization (Robbins, Dilla, Sedlezky, & Johnson Sirek, 2013) for the people they support. DSP continuity and stability are essential to the achievement of the meaningful outcomes listed above (Friedman, 2018; Hewitt, Larson, & Lakin, 2000;

Larson, Hewitt, & Lakin, 2004). To support people to achieve their goals, direct support professionals must be knowledgeable about the preferences and needs of a person using services. DSPs must also establish trust with the people they support and, often, their family members (Larson et al., 2004).

1.3.4.1   The Role of Leaders in the Direct Support Workforce Shortage

Like other industries, many IDD service sector leaders feel that workforce stabilization is the biggest challenge facing organizational and systems leaders today. While some factors are difficult to address, such as demographic and economic challenges, there are several factors on which service sector leaders can have a direct and immediate impact.

For instance, there is considerable evidence demonstrating that low compensation affects direct support workforce retention (Medisked Connect, 2016; PCPID, 2017). However, several studies reveal that supervisor and coworker relationships also impact Direct Support Professionals' job satisfaction and commitment to their role and organization (Ducharme, Knudsen, & Roman, 2008; Ford & Honnor, 2000; Gray-Stanley et al., 2010; Mascha, 2007). Other factors that influence DSP job retention include job stress (Gray-Stanley et al., 2010; Medisked Connect, 2016), support and empowerment (Bigby & Beadle-Brown, 2016; Gray-Stanley et al., 2010; Mascha, 2007), training (Hall & Hall, 2002; Hewitt & Lakin, 2001; Hewitt, Larson, Sauer, Anderson, & O'Nell, 2001; Medisked Connect, 2016) and role clarity (Hall & Hall, 2002; Larson & Hewitt, 2005). All of these also represent factors over which organizational leaders can have meaningful influence.

These findings align with the results of studies not specific to the IDD services sector. Gallup (Wagner & Harter, 2008) has demonstrated the importance of

relationships between managers and subordinates as well as coworkers on employee engagement across sectors. Research from education, (Farinde-Wu & Fitchett, 2018) nursing, (Nei, Snyder, & Litwiller, 2015) and child welfare (Benton, 2016) have also demonstrated that employees are more likely to stay in their jobs when they feel supported and empowered by a leader, supervisor or co-worker. These findings indicate that leaders play a crucial role in employee retention across sectors.

Although the research is sparse, findings from a few studies have demonstrated the influence that leaders can have, not only on retention but on the quality of services that DSPs provide as well. For instance, Beadle-Brown, Bigby, and Bould, (2015) and Bigby and Beadle-Brown (2016; 2018) found that when supervisors of Direct Support Professionals demonstrated "practice leadership"- conceptualized by the alignment of values and practice towards people with disabilities and co-workers through support, coaching, modeling, and supervision- quality of services increased.

The results above show the significant impact that leaders can have on issues related to workforce stabilization and quality. At the same time, these results highlight the need to begin to examine the specific skills, styles, and behaviors that leaders demonstrate to engage Direct Support Professionals in their roles.

1.3.5   Investment in the Next Generation of IDD Service Sector Leaders

Finally, there is an impending leadership gap in the nonprofit sector, of which the IDD services sector is a part. The Leadership gap generates instability in many of the organizations responsible for supporting people with IDD and their families. The causes of this instability are twofold: a potential leadership shortage and low investment in leadership development.

First, a large proportion of nonprofit executives are reaching or surpassing retirement age (Annie E. Casey Foundation, 2004; Landles-Cobb et al., 2015). They have been for almost a decade as approximately 10,000 baby boomers have turned 65 every day since 2010, and will continue to do so until 2029 (Heimlich, 2010). The aging of, until 2016, the largest group in the workforce, has been slated to cause a 'mass exodus' of top leadership in nonprofit organizations (Kunreuther & Corvington, 2007). Today, baby boomers still make up ¼ of the workforce even though the youngest of them is only ten years away from retirement age.

Over the past decade, several related studies conducted in nonprofit organizations have also shown that high numbers of executive leaders intend to retire shortly. A 2005 study from the Annie E Casey Foundation (Kunreuther, 2005) found that nearly 2/3 of nonprofit executives and senior managers planned to retire in 5 years or less. Studies from 2006 and 2011 found similar results (Cornelius, Moyers, & Bell, 2011; Tierney, 2006).

However, as fewer executives have retired than predicted, Callanan, Gardner, Mendonca, and Scott (2014) point out, the "retirement crisis predictions proved to be overstated" (p. 2). In fact, in their study of 438 nonprofit executives, the Bridgespan group found that organizations had to fill 43% of their executive roles in 2014 and 2015; however, only 6% of that turnover was due to retirement (Landles-Cobb et al., 2015).

Experts have speculated that the low retirement rates may be due to financial concerns instigated by economic recessions (Landles-Cobb et al., 2015). They have also suggested that leaders remain in their roles past typical retirement age due to continued passion for their work. Long term executives may feel that they are still

needed to accomplish the goals and mission of the organization (Glasrud, 2008; Grantmakers for Effective Organizations, 2007). These feelings may be related to a lack of trust that the next generation has the skills and experience needed to lead successfully (Landles-Cobb et al., 2015; Larcker & Miles, 2010). However, at some point, aging leaders will retire or leave their organizations, necessitating a large number of qualified leaders ready to fill those roles (Landles-Cobb et al., 2015).

Regardless of when nonprofit executives choose to retire, it is clear that the impending leadership gap in the nonprofit sector continues to loom due to a second and more pervasive cause. There has been very little investment from executive leadership and boards of directors in succession planning and leadership development in the nonprofit sector (Boardsource, 2017; Landles-Cobb et al., 2015; Larcker & Miles, 2010; Meehan & Jonker, 2017; Tebbe, Stewart, Hughes, & Adams, 2017).

Nonprofit studies from the past 15 years have consistently cited succession planning as a top concern for nonprofit executives and boards (Boardsource, 2017; Larcker & Miles, 2010; Meeehan & Jonker, 2017; Thompson-Brady et al., 2009; Tierney, 2006). Nevertheless, studies have shown that, generally, less than 1/3 of nonprofit organizations engage in intentional succession planning activities (Boardsource, 2017; Landles-Cobb et al., 2015; Larcker & Miles, 2010; Meehan & Jonker, 2017). A study of 140 nonprofit organizations also found that boards, on average, spend only 2 hours each year on executive director succession planning (Larcker & Miles 2010).

Further, nonprofits are not investing in the development of next-generation leaders from within their organizations. Importantly, they are not preparing internal and emerging leaders to move into leadership and executive roles (Landles-Cobb et

al., 2015; Larcker & Miles, 2010). This lack of investment has left many nonprofit organizations with vacancies and high turnover rates in leadership positions beyond those caused by anticipated retirement (Callanan et al., 2014; Landles-Cobb et al., 2015).

In some organizations, the impending leadership gap is also caused by unnecessary turnover due to emerging leaders' frustration with a lack of learning, growth, mentorship, and support opportunities (Landles-Cobb et al., 2015). Potential executives and CEOs are leaving their agencies to acquire positions that offer higher leadership titles, more responsibility, higher compensation, and promises of career advancements (Landles-Cobb et al., 2015). Research from the IDD services sector has characterized this as an issue impacting the retention of Direct Support Professionals as well (Hewitt & Larson, 2007; Medisked Connect, 2016). DSPs are leaving because they do not feel that there are opportunities for advancement and growth in their organizations.

Although most of the research cited spans the nonprofit sector, it stands that these findings apply to the IDD services sector. Most agencies that provide and advocate for services and supports for people with disabilities and their families are nonprofit organizations. Nevertheless, there is anecdotal evidence and limited research (Thompson-Brady et al., 2009) that have demonstrated the applicability of the previously discussed findings in the IDD services sector, specifically. For instance, in their study of executives and emerging leaders in IDD sector organizations, Thompson-Brady and colleagues (2009) found that less than 50% of respondents indicated that their organization had a succession plan. Moreover, all respondents

identified leadership development and mentoring for the next generation of leaders as a top priority within their organizations.

To address the nonprofit leadership gap, experts have shared that there has to be a deep understanding of the strengths, goals, and developmental needs of current and emerging leaders (Tebbe et al., 2017). A solution, then, is to increase empirical studies focusing on the characteristics, skills, practices, and needs of current and emerging leaders in the IDD service sector. Findings from these studies would inform training, technical assistance, organizational practices, and succession planning efforts. These efforts may prepare the next generation of leaders in IDD specific human service organizations to lead quality services and supports for people with intellectual and developmental disabilities and their families.

1.4   Justification for the Study of Generations

Many researchers consider generations unique phenomena that are worthy of study, as they shape the values, beliefs, and behaviors of the cohorts who define them (Arsenault, 2004; Mannheim, 1952). Generations are conceptualized as cohorts of people born in a similar socio-historical period; they form collective identities and memories that last over time (Conger, 2001; Meredith & Schewe, 1994). It is possible to understand more about a person's development, behaviors, and worldview by knowing which generation they belong to (Anderson et al., 2017; Arsenault, 2004; Bennis & Thomas, 2002).

Similarly, researchers have argued that ignoring generations in research can have adverse outcomes. Arsenault (2004) cautioned that "…failure to appreciate generational differences has created pop stereotypes and criticism from both the mass media and academia on its relevance to the diversity dialogue" (p. 125). Because

generations form lasting collective identities and memories, it behooves researchers and practitioners to fully understand generational differences and the impact they have in specific contexts (Anderson et al., 2017; Bennis & Thomas, 2002). Overall, the study of generations benefits social sciences because:

- It provides an understanding of generational characteristics and differences, leading to a better understanding of human behavior and development (Conger, 2001); and,

- It helps describe and explain distinctive cohort traits and behaviors that impact the interactions of people within and between generations. (Arsenault, 2004; Frey, 2018).

1.4.1 Importance in Leadership Research

Generational differences have become a particularly popular subject in the study of leadership characteristics, styles, behaviors and development (e.g. Anderson et al., 2017; Arsenault, 2004; Bennis & Thomas, 2002; Rudolph et al., 2018; Rudolph & Zacher, 2017; Twenge, 2010; Twenge & Campbell, 2008; Twenge & Campbell, 2012; Twenge & Kasser, 2013; Weick, Prydun, & Walsh, 2002; Wilson, Squires, Widger, Cranley, & Tourangeau, 2008; Yu & Miller, 2005)

The popularity of generational research in leadership may be related to the structure of the workplace. The workplace offers an ideal environment to examine generational differences in action. Typical workplace composition includes people who span a relatively wide age range tasked with performing around a common goal, product, or service. Each generation brings their individual and cohort related experiences and perspectives to the workplace, offering opportunities for both cross-generational creativity or misunderstanding and frustration (Bennis & Thomas, 2002).

Leadership scholars have described the efficacy of generational research to inform organizational practices and strategies. Research findings offer insight into the varying perspectives, values, and priorities that each generation brings to the workplace and leadership roles (Baur et al., 2016; Bennis & Thomas, 2002). Specifically, scholars have offered the following reasons to justify the importance of examining generations in leadership-focused research.

1. Because each generation offers unique perspectives, traits, and priorities, they bring different strengths to the workplace; understanding and leveraging those differences is good for business (Baur et al., 2016; Bennis & Thomas, 2002; Lancaster & Stillman, 2002);

2. Generational differences are a "legitimate diversity issue" in leadership (Arsenault, 2004, p. 137). Researchers and leaders must understand the unique perspectives of each generation to assure that industries and organizations embrace the diversity between different generations in order to engage and develop leaders (Anderson et al., 2017; Buckley et al., 2015; Harvey & Buckley, 2002).

1.4.1.1 Understanding the Intergenerational Workplace

Results from many studies of generations and leadership have found distinguishing characteristics, preferences, priorities, and styles between generations (e.g., Bennis & Thomas, 2002; Twenge & Campbell, 2008; Wilson et al., 2008; Yu & Miller, 2003; Yu & Miller, 2005). The literature review in Chapter Two provides examples of characteristics and qualities commonly observed in generational leadership research.

Researchers have suggested that leaders who understand generational differences can effectively employ strategies to cultivate intergenerational harmony in the workplace (Bennis & Thomas, 2002; Lancaster & Stillman, 2002; Salahuddin, 2011). They have recommended that targeted interventions, appreciative of generational differences, can increase leaders' productivity (Lancaster & Stillman, 2002), satisfaction (Salahuddin, 2011), and engagement (Gallup, 2016). These interventions, in turn, benefit organizations as they decrease the risk of turnover (Gallup, 2016; Lancaster & Stillman, 2002; Salahuddin, 2011) and disengagement, an issue that, by Gallup's (2016) estimates, costs businesses a total of $250 billion annually.

Evidence-based knowledge about generational traits and perspectives can also mitigate the impact of intergenerational misunderstandings in the workplace. For instance, age-related stereotypes and discrimination are pervasive issues (Perron, 2018; Raymer, Reed, Siegel, & Purvanova, 2017; Rodham, 2001) but have not been found to reliably predict generational differences in workplace behavior (Lester, Standifer, Schultz, & Windsor, 2012). As Anderson and colleagues (2017) described, "outdated or misinformed beliefs continue to live on through management lore" (p. 246).

Just as workplace discrimination can harm organizational culture, workforce diversity can benefit organizational creativity, innovation, and engagement (Milliken & Martins, 1996; Page, 2007; Williams & O'Reilly, 1998). As Arsenault (2004) contended, generational differences are examples of diversity, so capitalizing on the strengths and perspectives that each generation offers can also benefit the workplace (Gallup, 2016; Judge & Piccolo, 2004).

1.4.1.2   Leading Multiple Generations

A second, related justification for generational leadership research, centers on the premise that leadership is a continually evolving phenomena dependent on both the leader and the follower (Bennis, 2007; Hersey & Blanchard, 1977; Northouse, 2019). Therefore, best practices in leadership must evolve to reflect the needs and styles of emerging and developing leaders and their followers (Baur et al., 2016; Buckley et al., 2015; Harvey & Buckley, 2002; Pfeffer & Sutton, 2006).

Anderson and colleagues (2017) argued that because generational differences can be meaningful and pervasive in the workplace, "organizational leaders will have to lead these employees, [employees of a different generation] by necessity, differently" (p. 245). Specifically, in their assessment of the utility of conventional leadership theories and perspectives for the millennial generation, Anderson and colleagues (2017) determined that leadership theory and research must evolve to remain relevant for younger generations of leaders. The authors found issues with each of the leadership theories and perspectives examined. They concluded, "generational shifts have dictated a reevaluation of the applicability of many of our classic leadership approaches" (p. 253).

1.4.2   Importance in IDD Services Sector Leadership Literature

Finally, as the ideal skills and practices of leaders in the IDD services sector continue to evolve, applied generational research will benefit agencies that provide, regulate and advocate for services for people with IDD and their families. However, to date, there is one published article that addresses generational differences in IDD service sector leaders (Tolbiz, 2008). Although the publication did provide a comprehensive overview of the study of generational differences, the only application

to the IDD sector was related to the retention of the direct support workforce (Tolbiz, 2008).

The lack of generation and leadership specific research is not surprising- there is very little research focusing on leadership at all in the IDD services sector. This empirical gap may be reflective of organizational and systems priorities. As noted previously, studies have demonstrated that there is very little investment in leadership development for IDD sector agencies around the world (Beadle-Brown et al., 2015; Beadle-Brown, Mansell, Ockenden, Iles, & Whelton, 2013; Thompson-Brady et al., 2009).

At the same time, industry-specific research focusing on generational differences in leadership practices, as a whole, is rare. Yu and Miller (2005) have indicated a need for more context-specific research to understand how generational differences impact leadership in multiple sectors. They concluded that generational perspectives and traits present differently in varying industries or cultures. Context-specific research design increases the understanding of generational differences in leadership behaviors within that environment. Moreover, it adds to the body of generational research as a whole by testing whether findings hold from one arena to the next.

1.5   Purpose of the Study

This study will begin to fill an information void by exploring the traits, characteristics, and practices of human service leaders that provide, regulate and advocate for supports for people with intellectual and developmental disabilities and their families. This study serves as an introductory exploration into the generational and experiential differences in IDD service sector leadership behaviors.

To explore generational differences in leadership behaviors, a secondary analysis of data from the National Leadership Consortium on Developmental Disabilities Leadership Institute survey will be conducted. Data for this analysis was collected via an online survey between 2017 and 2019 before current IDD service sector leaders attended a weeklong leadership development program. Leaders were asked to rate their leadership skills, knowledge, and behaviors. Data related to individual and relational leadership behaviors will be analyzed. Two one-way MANOVAs will assess the differences in leadership behaviors by generational membership and IDD service sector leadership experience, respectively. Findings from these analyses will show whether and how leadership behaviors differ by the generation to which leaders belong and the experience they have in the field.

These findings will begin to describe behavioral differences and similarities across leaders working in organizations that directly impact the quality of services and lives for people with IDD and their families. Understanding generational and experiential differences in IDD service sector organizations and leaders will also offer more profound insight into the generation-specific support needs leaders may have (Anderson et al., 2017; Deloitte University, 2018). Findings from this study will inform practical organizational strategies to engage and groom the next generational of leaders.

Chapter 2

LITERATURE REVIEW

2.1 Approach

This study examined a relatively common topic of research, intergenerational leadership perspectives, in an industry that has not empirically addressed generational differences, the IDD service sector. As such, several areas of research have informed this study. Generally, the approach to gathering and synthesizing topic related research included a broad examination of relevant history, findings, and methodology in the following scholarship areas: services and supports for people with disabilities, generations, and leadership. Because each of these areas of research is extensive, the literature review that follows highlights publications and findings that contributes directly to the current study.

Although there are no empirical studies that have explored the generational differences among leaders working in the IDD service sector, there are bodies of interconnected research, making a case for such a project. When possible, the literature review included research that explores one or more of the topics listed above. For instance, extensive publications focus on generational trends in leadership. These studies provide examples of methodological designs and replicable approaches that have informed the current project.

Finally, the last section of the Literature Review describes the National Leadership Consortium on Developmental Disabilities and the Leadership Institutes.

This description provides a contextual overview of the study participants and the process by which they joined the project. Further, the description provides information about the program that has influenced the design of the study, survey, and secondary analysis.

2.2   Services and Supports for People With Disabilities

2.2.1   Connecting Service Quality and Quality of Life for People With IDD and Their Families

Over the past three decades, researchers have increasingly explored the connection across policy, service types, practice and quality outcomes for people with intellectual and developmental disabilities (Boehm & Carter, 2019; Friedman, 2019; Hewitt & Nye-Lengerman, 2019; Lakin & Stancliffe, 2007; Reynolds et al., 2015; Schalock, et al., 2002; Schalock, Gardner, & Bradley, 2007). Studies have observed the influence that structures, services, and support systems have on the quality of life outcomes and experiences of people with IDD and their families.

In general, researchers have identified several service practices that lead to quality lives for people with IDD and their families. These practices include community integration, individualized design, and assurances of choice and autonomy for people with disabilities over their services and lives (Lakin & Stancliffe, 2007; McCarron et al., 2019; Wehmeyer & Bolding, 2001; Wehmeyer, Kelchner, & Richards, 1995). These practices are related to higher quality of life outcomes for people with intellectual and developmental disabilities and their families (McCarron et al., 2019), including: choice and control (Neely-Barnes, Graff, Marcenko, & Weber, 2008; Stancliffe et al., 2010; Wehmeyer & Abery, 2013; Wehmeyer & Bolding, 2001)

social and community inclusion (Amado et al., 2013; Carter, Biggs, & Boehm, 2016) access to meaningful relationships (Friedman, 2019); realization of rights (Wehmeyer & Abery, 2013); and emotional wellbeing (Summers et al., 2007).

The publications cited below include studies that have assessed the connection between quality practices and outcomes for people with intellectual disabilities and their families. The studies selected center around the topics of choice and control and community inclusion.

2.2.1.1 Choice and Control

Researchers have generally explored differences in outcomes related to choice and control, based on the type and structure of services people with disabilities receive. For example, Neely-Barnes and colleagues (2008) analyzed National Core Indicator data collected in 2002. The authors employed structural equation modeling to examine the relationship between living arrangement and choice and control for adults with IDD (n=224) living in Washington. They found that smaller living arrangements (i.e., private apartments) were associated with higher levels of choice and control in a person's life.

A more recent study (Houseworth, Stancliffe, & Ticha, 2018), also using National Core Indicators data collected in 2013 and 2014, was conducted to explore the impact of state-level factors on choice. Specifically, the study examined the prevalence of institutional vs. Home and Community-Based Services, the proportion of people living on their own receiving services, the proportion of people living with their families and receiving services, and the cost of living. In total, data from 15,248 interviews were analyzed, representing 29 states. Hierarchical Linear Modeling was employed to assess the nested impact of individual and state characteristics on choice

and control. Houseworth and colleagues (2018) found that states with a higher proportion of people living with family or in their own homes also reported more frequent rates of choice and control for people with IDD.

As noted in Chapter One, some researchers have challenged these findings. Findings from recent publications have shown that change in type or location of services alone does not guarantee people have more control over their services and lives (Beadle-Brown et al., 2012; Bigby & Beadle-Brown, 2018; Friedman, 2019; Mansell, 2006). For instance, Bigby and Beadle-Brown (2018) conducted a review of literature focused on determinants of quality of life outcomes for people with disabilities. The authors developed a schema clustering empirical propositions related to quality of life outcomes. They determined that several factors were just as, if not more important, to consider when exploring outcomes related to choice and control for people with IDD. These factors included management practices and relationships, organizational culture, and organizational policies and practices.

2.2.1.2   Social and Community Inclusion

Social and community inclusion is another focus of IDD service sector research that emerged during the deinstitutionalization movement in the late 1960s and 1970s (Amado et al., 2013). This area of study continues to evolve as the conceptualization of what it means to be included in ones' community continues to shift from physical presence to social participation (Amado et al., 2013).

For instance, in the last few decades, there is more empirical evidence indicating that community access does not equate with community participation and belonging (Amado et al., 2013; Bogenschutz et al., 2015). Researchers have noted that the passage of the Americans with Disabilities Act and increases in Home and

Community Based Supports have facilitated services that support people with IDD to be more physically present in their communities. However, their results have shown that, despite these changes, people are not necessarily developing meaningful connections within their communities. They have posited that continued exclusion is due to persistent practices that socially ostracize people, both on the part of service agencies and communities themselves (Amado et al., 2013; Friedman, 2019; Hewitt, 2014).

In their review of literature related to community inclusion, Amado and colleagues (2013) found that most studies measure inclusion by the number of times people are present in their communities. They also found that some studies equate inclusion to indicators such as social relationships and the settings in which people live and work.

Results from this study and related projects (Jones, Gallus, & Cothern, 2016; Shogren, Luckasson, & Schalock, 2015) have set forth a call for the reconceptualization of community inclusion in research and practice. Researchers have recommended that future studies focus on whether and how people experience social inclusion, characterized by meaningful participation and belonging (Amado et al., 2013; Bogenschutz et al., 2015; Carter et al., 2016; Hewitt, 2014).

Furthermore, Amado and colleagues (2013) have also called for a more empirical focus on the experiences, attitudes, and practices of service sector professionals, including service sector leaders. They argue that these types of studies will help to connect practice with the outcomes of people with IDD and their families. Few studies have been designed to assess the role of organizational practices and

services in assuring social and community inclusion. Two such studies are summarized below.

Abbot and McConkey (2006) conducted a qualitative study that employed focus groups held with 68 people with intellectual and developmental disabilities using services from 16 agencies. Results from their study showed that community inclusion was facilitated or hindered by the services they received (Abbot & McConkey, 2006). Participants in the study shared that the community proximity of a person's home and access to transportation influenced community participation. They also noted that Direct Support Professionals played a significant role in their social interactions as they provided support to help people make connections.

Bigby and Wiesel (2014) also employed a unique approach to exploring social inclusion by observing 160 hours of services for 26 adults with IDD in public places. Specifically, they observed the social interactions between people with IDD and community members as well as the intervention and support provided by Direct Support Professionals. Bigby and Wiesel (2014) found that Direct Support Professionals played a vital role in the quality of social interactions that people with intellectual and developmental disabilities had with community members. The authors concluded that, while essential for people with IDD, social inclusion is a complex phenomenon that people and service providers may take for granted. They called for more training and professional support to assure that Direct Support Professionals have the skills to help people successfully navigate social exchanges.

Findings from the studies above show that there is a need for more research that explores how different organizational factors impact the outcomes of people with intellectual and developmental disabilities. Moreover, research is needed that

considers the practices of professionals working in agencies that support people with disabilities and their families.

2.3 Leadership

2.3.1 Definitions and Conceptualizations of Leadership in Research

The study of leadership is universal; observed across cultures and industries as an essential factor to the success and sustainability of any team or organization (Day & Antonakis, 2012; Kotter, 1990; Northouse, 2019; Wang, Tsui, & Xin, 2011). The study of leadership is also multidimensional. Leadership captures a complex process that accounts for several different definitions and conceptualizations (Jago, 1982; Northouse, 2019). Because the scope of leadership is so broad and complex, this study focuses on literature that explores organizational leadership, specifically.

2.3.1.1 Conceptual Approaches to Studying Leadership

Researchers have approached the study of leadership in several ways, exploring it as a relational or group process (Bass, 2008; Bennis, 2007; Bennis & Nanus, 2007; Jago, 1982), as a trait or characteristic (Bryman, 1992; Day, Fleenor, Atwater, Sturm, & McKee, 2014), as a behavior (Blake & Mouton, 1985; Friedrich, Griffith, & Mumford, 2016; Lanaj, Johnson, & Lee, 2016; Stogdill, 1948; Winston & Fields, 2015), as a skill (Day & Sin, 2011; Mumford, Marks, Connelly, Zaccaro, & Reiter-Palmon, 2000) and as a position (Riggio & Mumford, 2011). Table 1 on the following page describes common empirical approaches to the study of leadership. It is important to note that several studies incorporate multiple approaches (Northouse, 2019).

Table 1 *Conceptual Approaches to Studying Leadership*

Approach	How Leadership is Studied	Authors who have Utilized Approach
Relational/ Group Process	The interaction between leaders and followers are observed or examined as indicators of quality leadership; Followership or ratings of others are measured as indicators of quality leadership.	Atwater & Yammarino, 1992; Boyd & Taylor; 1998; Day, Gronn, & Salas, 2004
Behavior or Practice	Demonstrated behaviors/ practices are measured as indicators of quality leadership; The impact of leadership behaviors and practices on organizational and team outcomes are assessed.	Casimir & Ng (2010); Day & Sin, 2011; Judge, Piccolo, & Ilies, 2004; Martin, Rowlinson, Fellows & Liu, 2012; Stogdill, 1948
Trait or Characteristic	Personal traits/ characteristics of leaders are measured as indicators of quality leadership; Leaders are compared based on their characteristics/ traits; The impact of leadership traits/ characteristics on organizational/ team outcomes are assessed.	Bryman, 1992; Mumford, 2006; Scandura & Landau, 1996; Smith & Foti, 1998; Strang & Kunhart, 2009
Skill	Possession, demonstration, acquirement, and attainment of leaders' skills are measured as indicators of quality leadership; The impact of leaders' skills on organizational and team outcomes are assessed.	Barling, Weber, & Kelloway, 1996; Day & Sin, 2011; Lord & Hall, 2005; Mumford et al., 2000
Position	People are determined to be leaders by the position they hold within an organization; Leadership development/ growth are measured by advancement in or promotion to higher leadership positions.	Bennis & Thomas, 2002; Li, Arvey, Zhang, & Song, 2011

Kotter (1990), offering a more precise differentiation, described approaches to leadership as "trait" or "process"-based. Kotter noted that trait-based approaches focus on an individual leader, exploring their characteristics (Bryman, 1992) and skills. Process-based approaches require interaction between leaders and followers to investigate behaviors and relationships (Jago, 1982).

2.3.1.2 Defining Leadership

Over time, socio-historical conceptualizations of leadership have shaped theoretical and empirical approaches to its study. Avolio (2007) and Northouse (2019) have pointed out that there is no universal definition of leadership. Instead, scholarship and practical trends have determined the characteristics and processes that are valued at specific times. In his overview of the evolution of leadership definitions in the 20th century, Northouse (2019) demonstrated this phenomenon. He described the shift in conceptualizations of best practices in leadership from trait-based in the mid-20th century to relationship-based in more recent literature. Northouse defined trait-based leadership as focusing on the power and influence that leaders exert over subordinates (Hemphill, 1949). Conversely, relationship-based leadership focuses on the reciprocal interaction between leaders and followers, groups, and organizations (Avolio, 2007; Burns, 1978; Gardner, 1990; Rost, 1991).

Harvey and Buckley's (2002) investigation of organizational and leadership trends over time has aligned with Northouse's (2019) description. However, Harvey and Buckley (2002) theorized that a paradigm shift (likened to those defined by Kuhn, 1962) in leadership and management "wisdom" ultimately occurred around the turning of the 21st century. They described a paradigm shift characterized by leadership skills, practices, and processes that reflect flexibility and responsiveness to the expectations

of modern teams and organizations. They argued that successful leaders focus much less on authority and control and much more on their role in fostering a positive work environment and a culture of learning.

Harvey and Buckley (2002) believed this shift is due to several socio-historical influences, including:

- Increased research and understanding of best practices in management and leadership;

- Rapid advancements in technology and instant access to information;

- Access to a plethora of leadership books and training/ development opportunities, offering a wide variety of leadership theories and models;

- Globalization and advances in virtual communication and organizations; and,

- Changing expectations of leaders entering the workforce.

Harvey and Buckley (2002) have proposed that this shift in leadership over time is favorable. They argued that it benefits leaders to "reconstruct prior theory and reevaluate that which we consider to be historical management wisdom" (p. 368).

At the same time, modern conceptualizations of leadership do not ignore the skills and traits of leaders in research (Day et al., 2014; Peters & Watterman, 1982; Shamir & Eilam, 2005). However, they tend to emphasize the process of leadership in the context of followers, groups, and organizations (Avolio, 2007; Northouse, 2019).

2.3.2 Leadership Research

Leadership is an area of study that has dramatically evolved and expanded over the last century (Brungardt, 1996; Day et al., 2014; Northouse, 2019). The focus of

leadership research has become more rigorous. Many studies are designed to provide empirical evidence that tests longstanding assumptions about leadership in practice. Specifically, leadership research tends to address the following questions:

- What impact do leaders have on followers, teams, and organizations?

- What are the characteristics, skills, behaviors, and processes that yield impactful and successful leadership?

- What are the factors that influence the development of effective leadership characteristics, skills, behaviors, and processes?

2.3.2.1   Impact of Leaders on Followers, Teams, and Organizations

A primary assumption across leadership literature is that leaders play a critical role in the success of teams and organizations (Avolio, Gardner, Walumbwa, Luthans, & May, 2004; Behrendt, Matz & Goritz, 2017; Boal & Hooijberg, 2000; Day et al., 2014; Nohria, Joyce, & Robertson, 2003; Wang et al., 2011). Most leadership theory hinges on this assumption. In the last several decades, researchers have started to test this assumption empirically, yielding mixed findings as to the type and scope of impact that leaders have (Wang et al., 2011). Mixed results demonstrate a critical limitation in many studies of leadership; contextual factors that may account for variations in findings are often overlooked in research designs (Avolio & Gibbons; 1988; Wang et al., 2011; Zacher, 2015).

For instance, research projects investigating leadership impact are typically designed to evaluate the impact that top leadership, CEOs and Executive Directors, have on organizational performance (e.g. Finkelstein & Hambrick, 1996; Ling, Simsek, Lubatkin, & Veiga, 2008; Peterson, Smith, Martorana, & Owens, 2003; Waldman, Javidan, & Varella, 2004). Further, these types of studies do not generally

account for contextual factors, such as industry or sociocultural norms (Avolio, 2007; Wang et al., 2011).

Conversely, there are several examples of studies that do account for context. For instance, Wang and colleagues (2011) examined the relationship between leadership behaviors, organizational performance, and employee experiences in Chinese companies. The authors used a measure of leadership that was adapted to assess task and relational leadership behaviors central to Chinese business. They operationalized organizational performance by profitability, growth, market share and competitive status and employee attitudes, and perceived support.

Wang and colleagues (2011) utilized structural equation modeling to test the impact leadership behaviors had on organizational outcomes. They found that leadership task behaviors were directly related to organizational performance indicators. Relational behaviors were directly linked to employee attitudes and perceived support and indirectly linked to organizational performance indicators.

2.3.2.2   Leadership Characteristics, Skills, Behaviors, and Processes

Perhaps the most common approach to studying leadership involves the exploration and observation of leadership traits, skills, behaviors, and processes (Mumford, Todd, Higgs, & McIntosh, 2017; Zaccaro, Green, Dubrow, & Kolze, 2018; Zaccaro, LaPort, & Jose, 2013). Specifically, researchers often seek to determine the most useful aspects of leadership in different situations and environments (Zaccaro et al., 2018). Foundational leadership studies based on this approach include:

1. The Ohio State Studies that began in the 1940s and assessed how situational leadership dimensions (behaviors and practices) met the needs of followers and teams (Hemphill, 1949). This study developed conceptualizations, approaches, and methodologies that continue to

contribute to and influence leadership research (Schriesheim & Bird, 1979); and,

2. The Michigan Study of Leadership (Katz, 1955), that studied the skills and behaviors of leaders, categorizing them into task-oriented, relationship-oriented, and participative. This research investigated the developmental nature of leadership, contributing to the shift in leadership approaches from the observation of inherent traits to the identification of useful skills and behaviors.

In their meta-analysis of research conducted between 1924 and 2011, Zaccaro and colleagues (2013) found that researchers commonly assessed the following leadership attributes as factors that influence leadership success and impact:

- cognitive capacities: including intelligence, decision-making skills, ability to learn and strategic thinking);

- social capacities: such as social intelligence, interpersonal skills, communication skills, political skills, and persuasion skills;

- interaction styles: including authoritarianism and nurturance;

- personality: such as introversion, extroversion, charisma, narcissism, neuroticism, and openness;

- motives: including power, energy, ambition, and proactivity;

- core beliefs: related to self-efficacy and confidence;

- knowledge and skills: including technical ability and knowledge of a situation or business;

- experience: such as level of education and tenure) and identifying traits (such as gender, age, and physical traits

Zaccaro and colleagues (2013) also found that most studies are situational; they are conducted at a specific time in a specific context. However, they noted that many studies did not account for the influence that context and environment have. They recommended studies that systematically test the reciprocal relationships between

different leadership traits, characteristics, and skills in a specific team and organizational environment.

One example of a study that meets this recommendation came from Saleem (2015). To study the impact of leadership style on employee satisfaction in schools, Saleem (2015) assessed the relationship between leadership styles of department heads in Pakistani universities and job satisfaction of teachers within those universities. Saleem (2015) also considered the mediating role of organizational politics on the relationship between leadership style and job satisfaction to better understand the interaction in context. Leadership styles were assessed using Bass and Avolio's (1997) "Multi-factor leadership questionnaire." The questionnaire differentiated leadership styles between transformational and transactional. Saleem (2015) characterized transformational leadership as styles that focus on engaging and inspiring people to challenge their current beliefs, grow and exercise their capacity to change (Burns, 1978; Krishnan, 2012). Saleem operationalized transactional leadership by leader/follower exchanges that reward productivity, effort, and loyalty while punishing self-interest practices (Kanungo, 2001; Naidu & Van der Walt; 2005). Teacher satisfaction was determined using a generic measure of job satisfaction.

Correlation analyses showed a strong positive relationship between transformational leadership style and job satisfaction and a weak negative association between transactional leadership style and job satisfaction. Regression analyses demonstrated that perceived organizational politics had a partial mediating effect on the relationship between leadership styles and job satisfaction. There was a stronger mediating effect for transactional leadership styles. Saleem (2015) concluded that transformational leadership has a stronger and positive impact on teachers' job

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satisfaction, mitigating the effect of organizational politics, while transactional leadership styles do the opposite. This study is significant as it utilized a common approach to leadership research while addressing typical limitations by exploring the interaction of leadership attributes and context.

2.3.2.3   Factors That Influence Leadership Development

Typically, each approach to studying leadership is predicated on the belief that leadership is a skill, trait, behavior, or process that can be nurtured, fostered, and developed (Katz, 1955; Northouse, 2019; Riggio & Mumford, 2011). This assumption is supported both theoretically and empirically in leadership literature (Day et al., 2014; Day & Sin, 2011; Katz, 1955; Riggio & Mumford, 2011). However, in their literature review of research focusing on leadership development, Day and colleagues (2014) found that most leadership publications are theoretical. There are far fewer empirical examinations of leadership. These findings may be related to Avolio and Gibbons' (1988) criticism of leadership research. They have noted that many researchers approach the study of leadership as "timeless" (p. 55). They overlook the impact that both socio-historical and incremental time have on leadership skills, traits, behaviors, and processes (Zacher, Clark, Anderson, & Ayoko, 2015).

Researchers (Day & Sin, 2011; Riggio & Mumford, 2011) have also noted that how development is studied depends on the conceptual approach that researchers take to observe leadership. For instance, studies often operationalize leadership development by career growth and advancement, or leadership position (Day et al., 2014; Riggio & Mumford, 2011), while fewer explore the acquisition of skills and behaviors (Lord & Hall, 2005; Mumford, Campion, & Morgeson, 2007) and even fewer the development of relational leadership processes (Scandura & Landau, 1996).

2.3.3 Impact of Training on Leadership Behaviors

Empirical studies that do examine the development of leaders are more common in both organizational management and training literature (Day & Sin, 2011; Getha-Taylor, Fowles, Silvia & Merritt, 2015; Riggio & Mumford, 2011). Researchers and practitioners have employed different strategies to understand the most effective ways to enhance leadership skills and behaviors, including the development, implementation and assessment of mentoring, coaching, training and career path programs (Avolio, Avey, & Quisenberry, 2010; Bray, Campbell, & Grant, 1974; Russel & Kuhnert, 1992).

Moreover, these studies tend to use cross-sectional designs that are either retrospective or compare differences across age groups (grounded in the assumption that differences are due to developmental differences) (Riggio & Mumford, 2011). Riggio and Mumford (2011) have noted that studies that do employ longitudinal designs often observe development over short periods, spanning weeks. They have called for the increased use of long term longitudinal studies that span a significant amount of time to assess development effectively.

In one study, Day and Sin (2011), interested in exploring leadership trajectories over a 13-week leadership development program, mapped leaders' self-ratings of leadership identity, effectiveness, and goal orientation. Findings from this short-term longitudinal study demonstrated that leadership effectiveness did develop over time. However, Day and Sin (2011) determined that leaders' developmental trajectories differed based on their characteristics, initial self-ratings, and experiences throughout the leadership development course. Although the study offers a short-term perspective of leadership development, it supports the idea that people can grow as

leaders. At the same time, the study shows that leadership development is complex; individual and contextual factors impact the pace and scope of development over time.

Another example, a qualitative, longitudinal study of authentic leadership development (Fusco, O'Riordan & Palmer, 2015), applied a grounded theory approach. Fusco and colleagues (2015) analyzed the development of twenty-one leaders over eighteen months. Data collected via interviews and journals were coded and thematically analyzed. Fusco and colleagues (2015) found that leaders developed greater understanding and management of themselves. They also reported a better understanding of others, which led to more effective and flexible interactions. Leaders also felt more confident in their roles and capabilities. They indicated that they were more proactive and strategic in their leadership behaviors. Findings from this study highlight the benefit of qualitative studies as they provide valuable depth to the exploration of leadership development.

2.3.4   Impact of Time and Experience on Leadership Development

Alternatively, some researchers have focused on the process by which leaders develop skills and behaviors via organic professional growth and leadership experiences (Ackerman, 1989; Ackerman, 1991; Anderson, 1993; Mumford et al., 2000). These studies have attempted to understand how leaders adopt and enhance their leadership skills naturally and over time. For instance, Ackerman (1991) has asserted that many leadership skills and behaviors are acquired through a natural progression of learning, practicing, and achieving in day to day leadership roles. He has described a process that typically begins with understanding the skill or behavior, developing "performance capabilities" related to a skill or behavior, and performing a

skill or behavior enough that it becomes common practice (Mumford et al., 2000, p. 2).

One study exemplifying this perspective, employed a similar design to this study (Mumford et al., 2000). Mumford and colleagues (2000) examined differences in leadership skills across six grade levels of officers in the US Army, grouping them into three groups based on time spent in the field. Because the Army has a specific career progression system, Mumford and colleagues (2000) were able to employ a cross-sectional design and distinguish "experience in the field" by clusters of grade levels. Results from a discriminant function analysis showed that experience in the Army impacted the development of leadership skills and behaviors, even after accounting for promotions. They also found that leaders consistently displayed similar proficiencies on specific leadership skills at different points in their careers. Mumford and colleagues (2000) concluded that professional experience has a significant impact on leadership development.

Overall, because leadership is complex, multifaceted, and ever-changing, the study of leadership is, similarly, a moving target. Successful leadership research addresses complexity by aligning theory and methodology (Costanza, Darrow, Yost, & Severt, 2017; Northouse, 2019). Leadership scholars encourage design processes that consider the socio-historical, environmental and chronological context in the selection of research questions, participants, methodology and analysis (Bass, 2008; Bennis, 2007; Jago, 1982; Northouse, 2019; Riggio & Mumford, 2011; Zacher et al., 2015).

2.4   Generations

2.4.1   Defining Generations in Research

Social science researchers have studied generational differences for almost a century. Generational characterizations typically include three approaches (Alwyn & McCammon, 2007):

1. Position in the family lineage (i.e., parent, grandparent, child);

2. "Historical location" or birth cohort describing a group of people who are born within a specified period; and,

3. "Historical participation" building from historical location/ birth cohort characterization to describe the multidirectional influence that history has on people, but that people also have on history (Mannheim, 1952).

Although each characterization is used in generational research today, the final characterization reflects a more "modern" (Alwyn & McCammon, 2007, p. 224) approach. The approach used in this study considers the interaction of individuals and their environment.

Mannheim (1952) introduced the modern concept of generations as historical participants to social science research. In his seminal essay, The Problem of Generations, Mannheim (1952) described generations as a collective group of people who have a shared consciousness. Shared consciousness occurs because of the similarity in a cohort's birth year and collective cultural and contextual experiences.

The study of generations as historical participants emerged in social science research in the mid-20th century, around the same time that social scientists were building on the conceptualization and study of human development (Elder & Johnson, 2001; Elder, Johnson, & Crosnoe, 2003). During that time, researchers were formulating frameworks and theories to describe the multidimensional and

multidirectional relationship between individual development and socio-historical context and environment (Mannheim, 1952; Mills, 1959; Ortega & Gasset, 1933; Ryder, 1965). The conceptualization of generations offered a perspective from which to observe human behavior and development in the context of social and historical periods.

Researchers have explored generational differences across areas of study, including psychology (American Psychological Association, 2017; Kantrowitz & Naughton, 2001), politics (Halstead, 1999; Pew Research Center, 2019a; Putnam, 2000) economics (Bureau of Labor Statistics, 2018) marketing (Freeman, 2002; Freeman & Shirouzu, 2003; Rice & McDonald, 1995) and leadership development (Anderson et al., 2017; Arsenault, 2004; Rudolph et al., 2018). This research has heavily influenced practitioners, organizational leaders, and consultants. It has become 'on-trend' to develop and invest in interventions that leverage or mitigate generational differences in therapeutic approaches, marketing, and organizational structure and practices.

Although the field of generational research has grown in depth and reach over the decades, there is still some ambiguity as to the operationalization of generations (Rudolph et al., 2018). To that end, researchers have offered several determinants and characteristics that define a generation (Eyerman & Turner, 1998; Mannheim, 1952; Schewe & Evans, 2000; Strauss & Howe, 1997; Wyatt, 1993).

Typically, a generation is defined by a group of people who are not only born in a specific historical period but whose participation in that historical period "shape the historical process" (Alwyn & McCammon, 2007, p. 234 on Mannheim, 1952). This definition includes two primary components, characteristics of a period in time

and characteristics of a cohort who experience that period in time similarly (Arsenault, 2004; Eyerman & Turner, 1998; Wyatt, 1993). For instance, the millennial generation is people born between 1981 and 1996, because they are the first generation (in recent history) to come of age in a new millennium (Pew Research Center, 2010). Over time, this definition has been expanded to include additional factors that differentiate one generation from the next; these include:

- *Major historical events that have a significant societal impact* (Wyatt, 1993) For instance, researchers have speculated that the increased frequency of school shootings continues to fundamentally impact the psychological wellbeing and development of generation Z (born 1997 and after) (American Psychological Association, 2017). Findings from the American Psychological Association's (2017) annual Stress in America report showed that Generation Z is reporting the highest frequency of stress (and stress-related symptoms). Researchers believe this is, in part, brought on by the fear of mass shootings; 75% of respondents shared that this fear was a source of regular stress.

- *Substantial demographic shifts that are influenced by and cause changes in the distribution of societal resources* (Wyatt, 1993) These shifts include intervals of economic prosperity or recession, dramatic shifts in birth or death rate, and significant changes in access to technology. For example, the baby boom generation illustrates this characterization as it begins after WWII, marking the end of a period of tremendous societal unrest. The demographic shift that defines baby boomers is the sustained spike in the birth rate between 1946 and 1964 (Colby & Ortman, 2014).

- *Collective memory, or shared, lifelong traits and responses that are uniquely adopted by a group of people born within the same historical period (*Mannheim, 1952; Schewe & Evans, 2000): Culture, traditions (Arsenault, 2004) personas, values, attitudes (Strauss & Howe, 1997) emotions, preferences, dispositions and standard practices (Schewe & Evans, 2000) characterize the collective memory that are shared by a particular generation. For example, the silent generation (born between 1928 and 1945) grew up during the Great Depression (1929-1939), a period brought on by immediate and extreme economic instability and widespread

poverty. Although many in this generation lived to see an economic boom during and after WWII, as a whole, they remained financially conservative and maintained savings throughout their lives due to the experience of growing up during the Depression (Henger & Henger, 2012).

2.4.2   Focus and Application of Generational Research

The multidimensional and multidirectional relationship between people and their socio-historical environments has influenced the design and focus of the study of generations (Mannheim, 1952; White, 1992). Typically, generational research approaches that observe and assess one or more of the following:

- Characteristics of the relationship between people from one or more generations in a specific socio-geographical environment or period;

- Impact of the socio-historical environment on human development, traits and perspectives of one or more generations; and,

- Impact of the traits and perspectives of one or more generations in a socio-historical environment.

Generational research requires an intergenerational focus, as it is designed to observe and compare similarities and differences between generations (Alwyn & McCammon, 2007; White, 1992). White (1992), in his discourse about generations and cohorts, pointed out that the multidirectional relationship between individual and context exemplifies the need for intergenerational samples. White (1992) wrote, "a cohort can turn into (G)eneration only if there is some previous (G)eneration, and then only as previous (G)enerations- and the concerns they wrap around- are moved out of the way" (p. 32). The differences in how birth cohorts interpret and interact with social and historical environments are what define a generation and, thus, must be explored (Alwyn & McCammon, 2007; White, 1992).

2.4.3 Conceptual Issues in Generational and Leadership Research

Although Mannheim (1952) and other generational researchers (Eyerman & Turner, 1991; Schewe & Evans, 2000; Strauss & Howe, 1997; Wyatt, 1993) identified the characteristics that define and delineate one generation from the next, they did not determine consistent boundaries to describe membership in each generation. Inconsistent boundaries are a central issue for critics of generational research (Rudolph et al., 2018; Rudolph & Zacher, 2017). The factors that differentiate generations or generational boundaries vary from study to study (MacCallum, Zhang, Precher, & Rucker, 2002; Rudolph, 2015; Troll, 1970), threatening the external validity of research findings. Rudolph and colleagues (2018) offer the figure on the following page (Figure 1) to demonstrate the fluidity of generational cohort birth year used in previous publications.
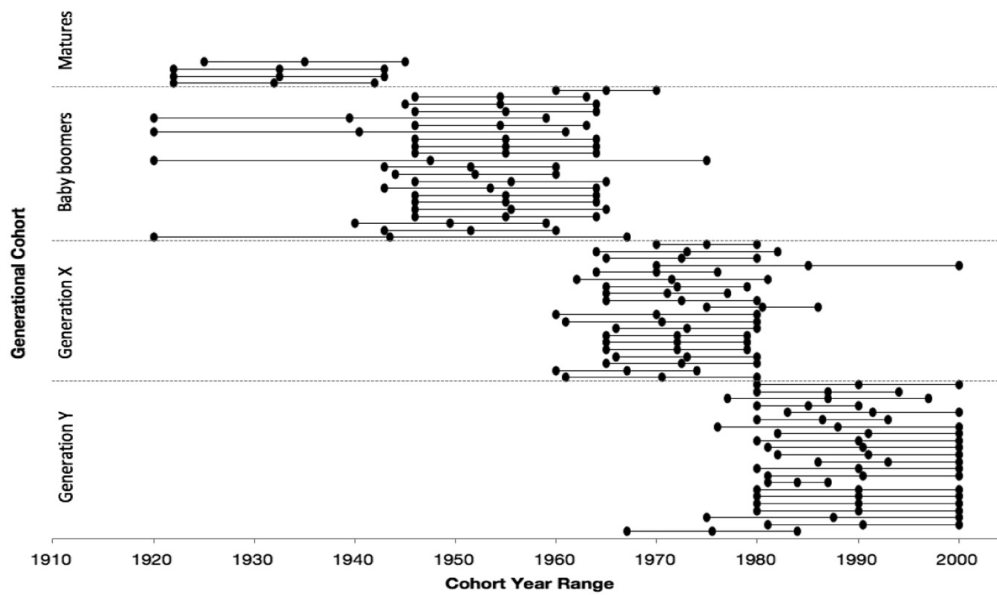
Figure 1 *Recently Published Generational Boundaries*

Inconsistencies in generational cutoffs may occur because the process for differentiating one generation from another is retrospective. Generations boundaries are informed, "by a range of factors including demographics, attitudes, historical events, popular culture and prevailing consensus among researchers" (Pew Research Center, 2015, para. 8).

Only in the last decade did federal departments, such as the Census Bureau and the Department of Labor, begin categorizing people by generation. In 2014, the Census Bureau (using research from Hogan, Perez, & Bell, 2008) published census

findings describing the living and working habits of the baby boomer generation. In 2016, the Department of Labor, Bureau of Labor Statistics expanded the practice of describing generations by publishing findings from workforce and spending data for Generation X, baby boomers, and the silent generation.

The Pew Research Center has also described the characteristics and behaviors of different generations. Recently, the Pew Research Center (2019b) offered boundaries for the newest generation, Generation Z. The Pew Research Center defined Generation Z as people who were born after 1997. This cutoff means that the first members of Generation Z were born 15 years after the first millennial, the same length of time used to differentiate millennials from Generation X.

Recognizing previous discrepancies in generational cutoff points, the Pew Research Center (2019b) noted that these boundaries are subject to change. As time passes, researchers will learn more about the cohort and period characteristics and experiences that will further delineate Generation Z and future generations. However, they also recognized that consistent generational boundaries are useful, offering the following commonly accepted cutoffs (these have been adopted in the current study): Greatest Generation- born 1927 or before; Silent Generation- born between 1928 and 1945; Baby Boom Generation- born between 1946 and 1964; Generation X- born between 1965 and 1980; Millennial Generation- born Between 1981 and 1996; and, Generation Z- born after 1997.

Generational scholars also acknowledge that ambiguous definitions and operationalizations of generations necessitate more research about generational characterizations and differences (Arsenault, 2004; Costanza et al., 2017; Yu & Miller, 2005). Specifically, critics of generational research have recommended that

researchers consider alternate boundaries with which to study age and context related experiences (Costanza et al., 2012; Rudolph et al., 2018). They have also recommended study designs that focus on the application of generational differences in specific contexts.

2.4.3.1 Examples of Alternate Boundaries Used to Explore Age and Contextual Experiences

There are several examples in literature demonstrating how researchers have used distinctive classifications, based on their research questions, to differentiate generational cohorts by experience and environment (Ahn & Ettner, 2014; Ornstein, Cron, & Slocum, 1989; Wieck et al., 2002; Yi, Ribbens, & Morgan, 2010; Yu & Miller, 2005). For instance, Yi and colleagues (2010) surveyed 277 Chinese leaders who were grouped by the proximity of birth year to significant historical and political events in China. These events included the Cultural Revolution of the 1960s, social changes in the 1970s related to China's open-door policy enforcement, and the "One Child" policy in the 1980s. The authors used factors that define and differentiate generations, specific to China's history and culture. Yi and colleagues (2010) hypothesized that these historical events would influence the cohort-specific characteristics and traits that people would bring to their leadership roles and expectations of other leaders.

2.4.3.2 Methodological Recommendations for Studies of Generations

Researchers have also suggested additional studies to test regularly used methodologies for examining generational differences to more effectively parse out

factors that influence the traits and characteristics of a generation (Costanza et al., 2017; Costanza et al., 2012; Rudolph & Zacher, 2017).

For instance, Costanza and colleagues (2017) reviewed conventional analytical methods used to study generational differences using the same dataset. Their findings showed a lack of convergence across each method; each analysis yielded different results in generational variances. The authors concluded that,

> researchers should very carefully establish a theoretical justification for the variables being studied… without such theoretical support and given the varying results that the analytical approaches produce, appropriate interpretation and application of such research is difficult if not impossible. (Costanza et al., 2017, p. 163)

Ultimately, critics of generational research have argued that researchers should not instinctively adopt generational (or cohort) boundaries without first considering the conceptual and theoretical reasons for doing so (Rudolph & Zacher, 2017). Moreover, researchers have demonstrated (Costanza et al., 2012; Lyons et al., 2006; Yu & Miller, 2005) that studies should be designed to systematically explore the contextual factors that may have equal or more influence on leaders' behaviors and traits than generational membership, such as industry, culture or characteristics of a workplace.

2.5 Examples of Literature That Addresses Multiple Areas of Focus

Interdisciplinary research that integrates perspectives, approaches, and methodologies relevant to the areas of focus outlined above were explored to inform the design of this study. Studies were selected that inform the approach and methodological design of this research project in the following ways:

- Approaches and methodologies used to consider the intersection between two areas of study, such as generations and leadership and leadership and supports and services for people with IDD;

- Identification of significant gaps in literature focused on generations, leadership, or the IDD service sector;

- Creative and innovative approaches that address research gaps and needs; and,

- Approaches and designs that make secure connections between theory and methodology

2.5.1 Exploring Generations and Leadership

Described in Chapter One, the study of generational differences is prominent in organizational and leadership research (Anderson et al., 2017; Arsenault, 2004; Bennis & Thomas, 2002; Rudolph et al., 2018; Rudolph & Zacher, 2017; Twenge, 2010; Twenge & Campbell, 2008; Twenge & Campbell, 2012; Twenge & Kasser, 2013; Weick et al., 2002; Wilson et al., 2008; Yu & Miller, 2005). The figure on the following page (Figure 2) demonstrates typical applications of generational research in leadership literature.

Approaches to Generational Research	Applications in Leadership Literature
Researchers explore characteristics of the relationship between people from one or more generations in a specific socio-geographical environment and point in time	Researchers observe and explore intergenerational relationships and perspectives of leaders in a profession, workplace or industry
Researchers assess the impact of the socio-historical environment on the human development, traits, and perspectives of one or more generations	Researchers assess the impact of a socio-historical environment on the development, traits, and perspectives of leaders (representing one or more generations) in the context of their work environments
Researchers examine the impact of the traits and perspectives of one or more generations on a socio-historical environment	Researchers examine the impact of the traits and perspectives of one or more generations of leaders on the norms, trends, and culture of a workplace or industry.

Figure 2 *Applications of Generational Research in Leadership Literature*

2.5.1.1 Intergenerational Relationships Within the Workplace

A primary function of generational research in leadership has been to leverage the unique strengths or mitigate differences between generations that impact workplace function and culture (Lyons & Kuron, 2014; Zemke, Raines, & Filipczak,

2000). As such, many studies focus on intergenerational relationships within a workplace environment (e.g., Arsenault, 2004; Hart, 2006; Perron, 2018; Raymer et al., 2017; Yu and Miller, 2005).

For example, researchers have explored the impact of age-related stereotyping and discrimination as it is a common intergenerational issue across industries. Raymer and colleagues (2017) found that 30% of younger workers experienced discrimination from older leaders. Similarly, a survey of 3,900 adults over age 45 from AARP (Perron, 2018) found that nearly 2/3 of workers ages 45 and older reported seeing or experiencing age-related discrimination during work.

Specifically, Raymer and colleagues (2017) surveyed 282 professionals representing millennials, Generation Xers, and baby boomers. Survey questions focused on respondents' experiences as the recipients or conveyors of age-related stereotyping. In addition to the findings described above, they found that 60% of participants had participated in negative stereotyping as well. Findings from this study demonstrate how observations of intergenerational relationships within the workplace environment can provide insight into crucial intervention strategies. The authors concluded their study with a call for organizational and human resource practices. Specifically, they recommended the adoption of processes and training that address generational bias and educate employees about the benefit of intergenerational workplaces (Raymer et al., 2017).

2.5.1.2 Impact of Socio-historical Perspective on Generational Differences in the Workplace

While it is less common, some researchers have also considered the impact of the socio-historical environment on the development, traits, and perspectives of

leaders representing one or more generations (Conger, 2001; Deloitte University, 2018; Zemke et al., 2000). Generally, researchers approach this topic in the discussion section of publications, calling for further research to test their ideas and interpretation of findings. As a result, many assumptions about the impact that context has on generational leadership patterns are speculative; few have been tested empirically.

For instance, in their overview of retirement patterns of baby boomers in the nonprofit sector, Carucci and Epperson (2011) discussed lower than expected retirement rates for baby boomers. They speculated that because baby boomers are of an era highly focused on social justice, they may not feel that they have done enough to make society equitable. Carucci and Epperson (2011) suggested that these feelings may cause baby boomers to remain in their positions well past the typical retirement age, an idea that has yet to be examined empirically.

One study by Deloitte University (2018) did empirically investigate the impact of generational membership on leaders' perceptions. The study was designed to explore the impact that socio-historical perspectives have on leaders' conceptualizations of diversity in the workplace. The authors hypothesized that differences in social and historical trends would impact how each generation defined diversity. Specifically, that generations would define diversity in a way that was reflective of their collective diversity-related experiences (Deloitte University, 2018). A thematic analysis of survey results from 3,726 baby boomers, Generation Xers, and millennials showed that their hypotheses were correct. Millennials were more likely to define diversity in the workplace by describing opportunities for people to express their unique and intersecting identities. Non-millennials (Generation X and baby

boomers) were more likely to focus on demographic representation and equality between different identities (Deloitte University, 2018).

2.5.1.3   Impact of Generational Characteristics on the Workplace

Researchers have explored differences in characteristics and qualities across different generations of leaders to understand how those differences impact trends and patterns in employment as well as workplace culture and environment. For instance, researchers have explored differences in leaders' career priorities to understand effective recruitment and retention strategies. Consistently, they have found that millennials tend to place more value on personal alignment with the mission and work culture than loyalty to any particular company (Berger, 2016; Gallup, 2016; Twenge & Kasser, 2013). Conversely, baby boomers tend to place value on loyalty to one's organization (Gursoy, Chi, & Erdem, 2013; Gursoy, Maier, & Chi, 2008; Smola & Sutton, 2002). Baby boomers are less likely to quit and more likely to value longevity at an organization than subsequent generations (Beutell & Wittig-Berman, 2008; Hart, 2006; Lu & Gursoy, 2013). Table 2 outlines some of the more commonly observed leadership styles, perspectives, and traits.

Table 2 *Commonly Explored Characteristics and Qualities among Different*
Generations of Leaders

Leadership Characteristics	Literature References
Leadership styles (personal and preferred)	Ahmed, Scott-Young, Ahmed & Fein, 2013; Rosen, 2001; Twenge, 2010; Twenge et al., 2012
Traits and behaviors that leaders value	Arsenault, 2004; Beutell & Wittig-Berman, 2008; Putnam, 2000; Robinson & Jackson, 2001; Smola & Sutton, 2000; Twenge, 2010; Twenge & Campbell, 2012
The centrality of and loyalty to a company	Daboval, 1998; Gursoy et al., 2008; Hart, 2006; Lu & Gursoy, 2013; Twenge & Kasser, 2013
Respect for establishment and authority	Coupland, 1991; Salahuddin, 2011
Expectations for workplace structure, culture, and operations	Cennamo & Gardner, 2008; Jurkiewicz, 2000; Lyons & Kuron, 2014; Ng, Sweitzer, & Lyons, 2012; Resler & Thompson, 2008; Shacklock & Brunetto, 2012
Technical leadership skills and strengths	Schewe & Evans, 2000; Wong, Gardiner, Lang & Coulon, 2008

Lue and Gursoy (2016) explicitly connected generational differences with organizational strategy in their study of leadership behaviors. The authors conducted a hierarchical regression analysis by dummy-coding generational differences (millennials and Gen X; millennials and baby boomers; Gen Xers and baby boomers) to "investigate the moderating effect of generational differences" (p. 218).

Specifically, they observed the moderating effect for generation on burnout, job satisfaction, and turnover intention, as well as on the relationship between job satisfaction and turnover intention. Results from this study showed a significant moderating effect for generations, particularly between millennials and baby boomers. Specifically, when millennials were emotionally exhausted, they were more likely to intend to leave their jobs than baby boomers. These findings are meaningful as they offer a deeper understanding of the interaction between generational characteristics and environmental factors.

2.5.1.4   Considerations for Methods and Design of Generational Studies in Leadership

2.5.1.4.1   Research Design and Time

Time is a central factor in the design of generational research. Socio-historic factors characterize the collective experience and boundaries of generations. Typically, cross-sectional designs are utilized in research focusing on generations and leadership (Arsenault, 2004; Bennis & Thomas, 2002; Costanza et al., 2012; Costanza et al., 2017; Ornstein et al., 1989; Rudolph et al., 2018; Yu & Miller, 2005). Cross-sectional studies, or point in time studies, are common across research disciplines as they are the easiest to conduct, particularly when there are limits on time and budget. In generational research, cross-sectional studies are beneficial as they control for period effects (variance that is due to socio-historical time) (Costanza et al., 2017). However, the primary limitation of cross-sectional studies in generational and leadership research is that they cannot, by design, control for age-related variances.

Alternatively, cross-temporal meta-analyses, while less common, are sometimes used in generational studies of leadership (Costanza et al., 2017; Donnellan, Trzesniewski, & Robins, 2009; Roberts, Edmonds, & Grijalva, 2010; Twenge, Konrath, Foster, Campbell, & Bushman, 2008; Twenge, Zhang, & Im, 2004). Cross temporal meta-analyses use time-lagged panels, data from multiple data sets collected at different times with similarly aged participants at each time, (e.g., college students from multiple decades). Cross-temporal meta-analyses are useful (when data is available) as they utilize data from previously collected datasets (Costanza et al., 2017).

The benefits and limitations of cross-temporal meta-analyses are, in essence, the opposite of cross-sectional designs. While the studies account for age-related differences, all data is from similarly-aged participants, so they confound contextual effects, such as cohort and period. It is not possible to determine if differences in groups are due to the historical context in which the data was collected, or actual differences in a generational cohort (Costanza et al., 2017; Rudolph & Zacher, 2017; Terraciano, 2010).

Several leadership researchers have called for the increased use of longitudinal or cohort sequential studies (a mix of cross-sectional and longitudinal design). These designs allow researchers to untangle age, cohort, and socio-historical factors (Costanza et al., 2012; Costanza et al., 2017; Zacher et al., 2015).

2.5.1.4.2 Research Design and Context

The conceptualization of generations considers both the historical and social contexts that impact generational characteristics. However, leadership literature pays less attention to the impact that the social environment has on the traits and behaviors

of different generations of leaders (Costanza et al., 2012). This trend is curious as social factors have been shown to significantly impact leadership values and attitudes (Robbins, Millett, Cacioppe, & Marsh, 1998).

Costanza and colleagues (2012) performed a quantitative meta-analysis of 20 published and unpublished studies of workplace outcomes. They determined that the impact of generational differences was often overgeneralized. They found this particularly true when conceptually important moderating factors were not considered in the analysis. Specifically, the authors conducted 18 pairwise comparisons using a sample of 19,961 people spanning four generations (characterized as Traditionals, baby boomers, Generation Xers, and millennials). Costanza and colleagues (2012) found that the relationship between work-related outcomes (satisfaction and organizational commitment) and generational differences was moderate to small in almost every analysis. Further, they noted that, due to small effect sizes (Schmidt & Hunter, 1977), it was likely that undetected moderators affected the results of the comparative analyses. They concluded that "differences that appear to exist are likely attributable to factors other than organizational membership" (p. 375) such as historical and social contexts.

Yu and Miller (2005) conducted a study that did explicitly consider alternate contextual factors. Their sample included baby boomers (over 35 years in age) and Generation Xers (under 35 years in age) holding leadership positions in two Taiwanese industries; higher education and manufacturing (n=437). Leaders were asked to respond to a 52-question survey about their work values, attitudes, expectations, and preferred leadership style. Two rounds of MANOVAs were conducted to assess differences between the variables of interest, first within each

industry (education and manufacturing) and then between each industry. Overall, the results from the study showed significant differences for generation in the manufacturing industry, but not in education. Despite the relatively arbitrary delineation for generational membership, the study demonstrated the need for continued exploration of contextual differences in generational leadership.

2.5.1.4.3   Methodological Concerns

Finally, while the exploration of generational differences has continued to pervade leadership research, some have criticized the area of study altogether (Rudolph & Zacher, 2017). Some researchers have gone so far as to advocate for the discontinuation of the examination of generational differences in leadership (Rudolph et al., 2018). Perhaps most vehemently opposed to this body of research are Rudolph and colleagues (2018). In 2018, they put forth a "formal call for a moratorium to be placed upon the application of the ideas of generations and generational differences to leadership theory, research and practice" (p. 44).

Rudolph and colleagues (2018) have speculated that leadership scholars find generational research appealing for two, misconceived reasons. First, they argue that exploring generational differences, rather than the continuous process of aging, "provides an inherent advantage for understanding the complex role of age within one's social world" (p. 46). According to Macrae, Milne, and Bodenhausen (1994), organizing patterns of behavior by group-based generational differences rather than age is easier. Second, they argued that because generational differences are socially constructed (Rudolph & Zacher, 2015), they have been willed into existence in the workplace. Continued acknowledgment in research, media, and organizational consultants perpetuates the issue (Costanza et al., 2012). Rudolph and colleagues

(2018) have suggested that constant attention has resulted in social determinism. Generational differences are used to explain individual, workplace, and leadership behaviors, causing companies to adapt their organizational structures and practices. These cycles continue their pervasive focus.

Through a critical review of theory and literature, the authors (Rudolph et al., 2018) outlined three "fundamental problems" with the exploration of generational differences, namely that:

1. There are "flawed assumptions about the role that generations… play in shaping individual-level outcomes." (p. 44);

2. There is not sufficient methodology to study actual differences across generations; and,

3. Empirical evidence does not satisfactorily support differences by generation or "that they manifest as differences in work attitudes, motivation, or behavior." (p. 44).

Each of these concerns is explored briefly below, as they impact the design of the current study.

2.5.1.4.4   The Conflation of Generation and Age

Researchers have cautioned that the study of generations is flawed because it is impossible to observe generational differences only. Contemporaneous individual and contextual factors, such as cohort effect, period effect, and age, become conflated in most, if not all, analyses (Fineman, 2011; Rudolph & Zacher, 2017; Walker, A., 1993). The issue of conflation in generational studies of leadership is worth exploring as it reflects issues in empirical and media literature over time.

For instance, as each generation comes of age to enter the workforce, it is common for researchers and the press to publish articles focusing on the narcissistic

tendencies of that generation (Reeve, 2013). Business and leadership research from the 1980s and 1990s, highlighting the differences between Generation Xers and baby boomers described Generation Xers as individualistic (Daboval, 1998), more focused on their personal career than loyalty to an organization (Daboval, 1998, Twenge, 2010) and less respectful of establishment and authority than previous generations (Daboval, 1998). Decades later, research focused on differences between millennials and previous generations (including Generation Xers and baby boomers) describes millennials as self-involved (Twenge & Campbell, 2009; Twenge & Foster, 2010), less respectful of authority than previous generations (Ahmed et al., 2013) and more concerned with themselves than others (Lyons, Duxbury, & Higgins, 2005; Twenge, Campbell, & Freeman, 2012).

In popular media, similar patterns have emerged. In 1976, Tom Wolfe wrote a piece published in New York Magazine entitled "The Me Decade and the Third Great Awakening." Wolfe (1976) argued that individualistic attitudes had overpowered traditions of the communitarianism that defined previous American attitudes. He suggested that individualism was particularly prominent in younger generations (baby boomers) as they were becoming adults in an era that idealized self-actualization and self-discovery. Three years later, the book The Culture of Narcissism: American Life in An Age of Diminishing Expectations (Lasch, 1978) became a national bestseller.

In 2013, Time Magazine published an article entitled "The Me Me Me Generation" (Stein, 2013). Throughout the article, Stein (2013) cited examples indicating that millennials are the most narcissistic generation to date. Stein (2013) boasted that unlike previous pieces that complain about the narcissistic tendencies of younger generations, "[He] has studies! [He] has statistics! [He] has quotes from

respected academics!" (p. 1). In the next few years, several books, including, Kluger's (2015) The Narcissist Next Door and Burgo's (2016) The Narcissist You Know, were published. These books promised to help people navigate narcissism (generally from younger generations) in the workplace, family home, social groups.

In 2013, Reeve wrote a counter article "Every Every Every Generation, Has Been the Me Me Me Generation," published in the Atlantic. She argued that researchers and journalists are doing what Rudolph and Zacher (2015) warned about, by conflating age-related traits with generational characteristics. Reeve (2013) cited research that countered commonly used findings related to millennial narcissism (Donnellan et al., 2009; Roberts et al., 2010). Specifically, she cited research demonstrating that findings from previous studies were flawed. Results showing higher rates of narcissism in millennial college students (Twenge et al., 2008; Twenge & Foster, 2008) were the result of incomplete meta-analyses that omitted recent and relevant data.

Findings from additional studies have also highlighted the conceptual and methodological issues in many generational leadership publications. For example, Costanza and colleagues (2012) conducted a meta-analysis of data that had yielded significant differences in generational leadership experiences. In general, they found small to no differences in job satisfaction and organizational commitment across generations. A qualitative study by Stassen, Anseel, and Levecque (2016) yielded similar findings. Costanza and colleagues (2012) concluded their study with a call for further, cautious exploration of generational differences. They noted, "it is clear that a better conceptualization of generational phenomena and better methods for conducting empirical research are needed" (p. 391).

2.5.1.4.5 Methodological Recommendations for Studies of Generations and Leadership

Criticisms of generational leadership research do not negate the significant findings of previous studies (e.g., Arsenault, 2004; Burke, 2004; Yu & Miller, 2005). In fact, instead of a moratorium, these issues may support a call for further research exploring generational differences in leadership. As Roberts and colleagues (2010) have noted, "replication is the bedrock of science" (p. 98). Additional studies that replicate methodologies on the same or different populations or in the same or different contexts as previous studies will help to assure the validity of generational research findings.

The issues identified compel researchers to approach the study of generational differences in two ways. First, as Costanza and colleagues (2017) recommended that researchers assure sound theoretical justifications that support the chosen methodology, accompanied by clear conceptualizations of the study variables. Second, researchers must be cautious in their interpretations and applications of the results of generational studies, as their findings impact organizational decisions. Costanza and colleagues (2012) warn that "practitioners and consultants have seized on alleged generational differences developing seminars and interventions designed to help organizations deal with them" (p. 376). Researchers should avoid the temptation to overgeneralize or overextend their findings beyond the methodological and theoretical limits of their studies.

2.5.2 Connecting Leadership to Quality in IDD Sector Research

Studies that connect leadership and services and supports for people with disabilities is another area in which there is limited, but useful literature for this study

(e.g. Agranoff, 2013; Amado et al., 2013; Bigby & Beadle-Brown, 2018; Bigby & Wiesel, 2014; Foster-Fishman et al., 2007; Neeley-Barnes et al., 2008; Parish, 2005; Thompson-Brady et al., 2009; Walker, P., 1993). In particular, publications that have explored the role and impact of leaders at the organizational (Bailey & Gilden, 2018; Bigby & Beadle-Brown, 2018; Thompson-Brady et al., 2009; Walker, P., 1993) and systems (Agranoff, 2013; Parish, 2005) levels, provide methodological insight.

For instance, in her comparative case study of two deinstitutionalization approaches, Parish (2005) found that competent leadership was an essential factor in the success (or failure) of the transition process. Results from semi-structured interviews with leaders from Illinois (n=31) and Michigan (n=21) demonstrated that collaborative leadership facilitated a successful transition in Michigan while fragmented leadership slowed progress in Illinois.

At the organizational level, Bigby and Beadle-Brown (2016) conducted an interview and observation-based study of culture in group homes (group residences for adults with IDD). They investigated the factors that led to quality services and supports. Findings from the qualitative analysis of interview responses and observations showed that leadership skills and practices, defined as practice leadership, were related to higher quality services and supports. These studies offer an essential contribution to disability research. They provide insight into the skills, behaviors, knowledge, and resources that leaders need to ensure the transformation to and implementation of quality services and supports.

2.6 Description of the National Leadership Consortium on Developmental Disabilities

2.6.1 Purpose of the National Leadership Consortium on Developmental Disabilities

The National Leadership Consortium on Developmental Disabilities was established at the University of Delaware in 2006 to fill a void for IDD service sector leaders. Predicated on the belief that leadership is a practice that can be developed and improved, the work of the National Leadership Consortium adopts a developmental leadership approach. The National Leadership Consortium provides training and development opportunities for current and emerging leaders in the IDD services sector, including leaders working in agencies that:

- Provide services and supports;

- Design and regulate services at the local, state/ province and federal/national level;

- Advocate and conduct research for adults with IDD; and

- Provide training, advocacy support, and technical assistance to IDD service sector agencies and leaders.

Before the National Leadership Consortium, only generic leadership development opportunities and courses existed. However, there were no programs available that addressed the developmental needs of leaders who are working to promote best practices in services and supports for adults with intellectual and developmental disabilities and their families.

2.6.2 Description of the Leadership Institutes

The primary offering of the National Leadership Consortium on Developmental Disabilities is the Leadership Institute. The Leadership Institute is a weeklong leadership development program that includes lectures, experiential activities, self, and organizational assessments, and small and large group discussions. The Leadership Institutes are facilitated and led by national and international IDD service sector leaders. All aspects of the Leadership Institute are designed to promote leadership development related to behaviors and skills that enhance leaders':

- Understanding of trends and current and best practices in services and supports for adults with intellectual and developmental disabilities;

- Capacity to assure that services and supports are responsive to the wants and needs of people with IDD and their families;

- Capacity to lead and manage organizational transformation towards best practices in services and supports; and,

- Capacity to lead effective teams and sustainable organizations.

At the time of the analysis, 73 Leadership Institutes had been held between January 2006 and May 2019 in twelve United States, two Canadian provinces and two countries outside the US and Canada (Hungary and Israel). To date, more than 1900 people have attended a Leadership Institute, representing 49 United States and the District of Columbia, as well as 20 additional countries, including Armenia, Australia, Azerbaijan, Canada, Chile, Croatia, Czech Republic, England, Georgia, Hungary, Israel, Italy, Jamaica, Kyrgyzstan, Latvia, Moldova, Qatar, Romania, Serbia and Slovakia.

2.6.3 Qualifications for Participation in the Leadership Institute

Participants apply to attend each Leadership Institute, approximately six months in advance. To apply, leaders are asked to answer questions related to their occupational history and goals, leadership role, and organizational role in the IDD services sector. Applicants are also asked to describe their current and future goals for assuring person-directed, individualized services and supports for people with disabilities and their families. National Leadership Consortium staff select participating leaders based on application responses.

Applicants must work in the field of intellectual and developmental disabilities and are selected based on their perceived leadership potential within their organizations and the IDD system, as well as their willingness to participate in the research project. Approximately 30 leaders attend each leadership institute; these leaders are the source of data for the current study.

2.6.4 Participation in the Longitudinal Study of Leadership

As a requirement for acceptance to the Leadership Institute, all leaders agree to participate in the longitudinal research study that began in July 2008. The longitudinal research study was designed to explore the impact of the Leadership Institute. The study assesses participating leaders' individual development, organizational leadership, and influence on organizational and systemic change.

To participate in the study, leaders respond to an online survey before, directly after, and each year following participation in the Leadership Institute for five years. Additional opportunities to respond are also offered at various points within the five years. Opportunities include individual interviews, focus groups, and online surveys. The current study conducted secondary data analysis on the responses to the

longitudinal research study conducted by the National Leadership Consortium on Developmental Disabilities.

2.7   Conclusion

Researchers continue to connect the outcomes of people with intellectual and developmental disabilities to the structure and practice of services and systems that they access. As such, there is a growing need to understand more about the behaviors of the leaders who provide regulate and advocate for those services (Amado et al., 2013; Thompson-Brady et al., 2009). Overall, the literature outlined above shows that the focus of this project addresses a missing and vital area of research regarding services and supports for people with intellectual and developmental disabilities and their families. This study offers a foundational exploration of the leadership behaviors and practices of leaders working in the IDD service sector, leaders who have attended the National Leadership Consortium on Developmental Disabilities Leadership Institutes. Findings from this study provide a deeper understanding of generational and experiential variances in IDD service sector leadership behaviors.

Chapter 3

THEORETICAL FRAMEWORK

This study utilized the life course theory and a behavioral leadership approach to guide the research questions, methodological design, analysis, and interpretation of the findings. The life course theory provides a useful framework from which to explore generational differences in leadership perspectives and behaviors. Specifically, life course theory offers a contextual model of development that considers individual and environmental factors. A longstanding criticism in leadership research is that many studies do not adequately account for age, life stage, and historical period in their design and analysis (Avolio & Gibbons, 1988; Day, 2011; Rudolph & Zacher, 2017; Zacher et al., 2015). Studies tend to focus on general leadership perspectives and experiences, or non-age-related characteristics (e.g., gender or industry) (Avolio, Walumbwa, & Weber, 2009; Day, 2011; Zacher et al., 2015).

Researchers have also noted that there is not enough known about the actual differences in leadership traits, perspectives, and styles between younger and older leaders. This knowledge gap shows a need to better ground the exploration and analysis of generational differences in theory. Generational scholars have argued that theory can improve and clarify the conceptualization of generation as a phenomenon. Increased use of theory will promote logical, methodological decisions, sound

interpretation, and application of findings (Costanza et al., 2012; Costanza et al., 2017; Zacher et al., 2015). The life course theory offers that grounding perspective.

In addition to the life course theory, the study adopted a leadership specific approach to guide research questions and methodological decisions. Leadership approaches are useful in studies of leadership development and practice as they provide a lens by which to observe characteristics, skills, and behaviors (Anderson et al., 2017; Inceoglu, Thomas, Chu, Plans, & Gerbasi, 2018; Northouse, 2019). However, a meta-analysis of 71 articles exploring the impact of leadership behaviors on employee wellbeing showed that most leadership literature does not provide a strong theoretical basis to guide research questions, constructs measured, or analyses performed (Inceoglu et al., 2018). Inceoglu and colleagues (2018) found that many researchers select variables, methodological design, and analyses based on frequently selected factors and methods used in previous publications.

A behavioral leadership framework focuses the study on the practices that leaders enact within their organizations. As the discussion in previous chapters has demonstrated, there is a need to draw more explicit connections between organizational structures and practices and quality services (Friedman, 2019). Particularly useful are investigations of leadership behaviors that contribute to the development, transformation, and provision of services that assure individualized supports for people with disabilities and their families (Amado et al., 2013; Schalock & Verdugo, 2013; Thompson-Brady et al., 2009). A behavioral leadership framework provides structure to guide the approach and design to such an investigation (Northouse, 2019).

An underlying goal of this study is to optimize the benefits offered by these two theoretical frameworks. Specifically, the use of these frameworks will enhance the practical application of findings (Costanza et al., 2012; Schwandt, 2014) and support the growth of research focusing on the behaviors of IDD service sector leaders.

3.1 Life Course Theory

The study adopted a life course theory as it considers the influence of both personal and socio-historical factors on individual development (Elder, 1994; Elder & Pellerin, 1998).

3.1.1 History and Use of Life Course Theory in Research

As the study of human behavior and human development evolved in the early 20th century, researchers began to realize that the growth and development of children, adolescents, and adults varied considerably by context. In his seminal piece, The Sociological Imagination, Mills (1959) discussed the connections between the individual and society. He criticized previous theories that did not adequately observe human development and society as multidimensional or multidirectional constructs (Brewer, 2004). Ultimately, Mills (1959) called for "the study of biography, of history, and of the problems of their intersection within social structure" (p. 149).

As a developmental theory, the life course theory emerged in the 1960s (Elder, 1998) as it met the criteria of a theoretical orientation (beyond perspective, approach or framework) (Merton, 1968) and served to "establish a common field of inquiry by providing a framework for the descriptive and explanatory research" (Elder et al., 2003, p. 4). In its design, the theory was responsive to a need in social science research as it addressed the multi-influential nature of individuals in an ever-changing

historical context (Elder, 1998; Elder et al., 2003). As time passes and demographic and social trends have continued to change, the life course theory has also evolved (Elder et al., 2003).

Although they are often used interchangeably (Alwyn, 2012), life course theory is distinguished from other ontogenetic approaches. Namely, life course theory is different from the life span approach or life cycle and life history perspectives (Alwyn, 2012; Elder, 2001). Each perspective appreciates the interaction of person and environment. However, the life course theory was built on the premise of context (Elder, 1996), making it an ideal theory to approach generational differences in IDD sector leaders.

Life course theory has been applied in multiple research arenas (e.g., sociology, psychology, history) and fields (Elder et al., 2003) including leadership (Murphy & Riggio, 2008) human development, family demography and services and supports for people with intellectual and developmental disabilities and their families (Heller, Gibbons, & Fisher, 2015; Reynolds, Palmer, & Gotto, 2018; Seltzer, Greenberg, Floyd, Pettee, & Hong, 2001; Seltzer, Greenberg, Osmond, & Lounds, 2005).

3.1.1.1 Applications in Research: Leadership

Researchers have recommended increased use of the life span approach in studies of leadership (Rudolph & Zacher, 2017; Zacher et al., 2015; Zacher et al., 2017). Specifically, they have called for the application of a theory that considers both the nature of leadership development and the impact of contextual factors (such as history and environment) (Avolio, 2007; Covelli & Mason, 2017; Day et al., 2014; Shamir & Eilam, 2018). Day and colleagues have indicated that life span approaches

are salient as they "reflect both the multilevel and longitudinal nature of development" (p. 64). They argued that life span approaches "contribute to a greater understanding of how leaders and leadership processes develop and change…" (p. 64).

Rudolph and Zacher (2017) have also argued that the life span approach can mitigate flaws in generational research, particularly the conflation of age, cohort, and historical period. However, they also note that very few studies consider theory in their design.

3.1.1.2 Applications in Research: Family Experiences and Services and Supports for People With Intellectual and Developmental Disabilities and Their Families

In recent years, researchers have increasingly applied life course theory to the design of studies focusing on people with disabilities, their families, and their services. Life course theory has been used to describe the multi-influential nature of individual and contextual factors that impact outcomes and wellbeing for people with disabilities and their families. For instance, studies grounded in life course theory have assessed the impact of having a family member with a disability at certain stages in individual and family life, including:

- As parents and caregivers age (Agosta, Melda, & Bradley, 2009; Heller & Arnold, 2010; Heller et al., 2015);

- As parents are raising children with disabilities (Neely-Barnes, Graff, Roberts, Hall, & Henkins, 2010; Seltzer et al., 2001); and,

- Within the sibling relationship (Heller & Arnold, 2010; Seltzer et al., 2005).

Studies have also considered the impact of contextual factors that influence access to service systems and perspectives on disability within the family (Miltiades &

Pruchno, 2002; Ow, Tan, & Goh, 2004; Valentine, McDermott, & Anderson, 1998) as well as access to and need for services and supports across the life span (Agosta et al., 2009; Parish, Thomas, Rose, Kilany, & Hattuck, 2012; Reynolds, Gotto, Agosta, Arnold, & Fay, in press; Reynolds et al., 2015)

This study did not include the developmental perspectives of people with IDD and their families. However, the research listed above is relevant to the current study. Specifically, it shows how prevalent the use of life course theory is, already in IDD service sector literature. Using life course theory also aligns a relatively new topic in IDD service sector research (leadership) with an established body of literature. The theory provides a common language, perspectives, and approaches that may be useful to bridge knowledge about people with disabilities, their families, and practitioners.

3.1.2   Definitions, Principles, and Assumptions of Life Course Theory

This study applied Elder and colleagues' (2003) definition of life course theory as the study of "age-gated patterns that are embedded in social institutions and history… [that] emphasizes the implications of social pathways in historical time and place for human development and aging" (p. 4). Further, the study considered five primary principles of life course theory (Elder et al., 2003) to guide the design, methodology, and interpretation of findings. These principles include the following assumptions (Elder et al., 2003):

- Principle of life span: the assumption that human development is lifelong;

- Principle of agency: the assumption that a person's life course is self-constructed (determined by their own choices and actions) within the historical and social confines (or opportunities) experienced;

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- Principle of time and place: the assumption that a person's life-course trajectory, history, geography, and social circumstances are interrelated;

- Principle of timing: the assumption that the timing of significant life events influences a person's developmental trajectory. More precisely, the theory describes life events ("turning points") and changes in status (transitions) as well as the length of time between transitions (duration) that occur throughout the life course; and,

- Principle of linked lives: the assumption that people live their lives interdependently. Specifically, networks of shared relationships impact a person's individual development.

3.1.2.1 Application of Principles of Life Course Theory to the Proposed Study

The assumptions and principles inherent to life course theory make this theoretical approach relevant to the current study. The principles are useful to consider the individual and contextual factors that influence the leadership perspectives, as well as the behaviors of professionals in the intellectual and developmental disabilities service sector. The principles of life course theory (Elder et al., 2003) framed the approach to the project's design, selection of variables, methodology, and interpretation of findings.

3.1.2.1.1 Principle of Life Span

Because the sample of leaders included in this study are adults, a theory that considers adult development is beneficial. The principle of life span highlights the foundational purpose of life course theory to extend the study of human development beyond childhood (Elder et al., 2003).

3.1.2.1.2 Principle of Agency

The sample included in this study included leaders who were preparing to attend a weeklong leadership development program. As such, leaders were consciously participating in a program designed to enhance their leadership capacity, demonstrating the agency that participants have in their leadership development. It is assumed that participants answered survey questions with this developmental expectation in mind.

The principles of life span and agency also help to reconcile a critique of generational research. Lifelong identities are an assumption of generations (Schewe & Evans, 2000). Elder and colleagues (2003), characterized the concept of generations as deterministic for this reason, interpreting the assumption of lifelong identity as conflicting with the principle of agency. This criticism has compelled researchers to urge for more studies that operationalize generational characteristics and traits. They have called for studies that investigate the differences between factors related to generational differences (lifelong) and those related to other factors such as age, culture and individual experiences (adaptable) (Costanza et al., 2012; Roberts et al., 2010; Yu & Miller, 2005).

However, the study of generations was never intended to describe every characteristic and behavior of humans born within a specified socio-historical timeframe. Instead, generations were conceptualized as a lens through which one can understand the characteristics of a cohort who experience a period in time similarly (Eyerman & Turner, 1998). Therefore, life course theory was used to frame generational differences in leadership behaviors, assuming that leadership is not stagnant or generationally predetermined.

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3.1.2.1.3　Principle of Time and Place

The study of generations is grounded in the assumption that the socio-historical context greatly influences the "collective memory" and "identity" of each generation. Therefore, the principle of time and place is well aligned as it guides the in-depth exploration of the factors and experiences that impact leaders' behaviors.

3.1.2.1.4　Principle of Timing

The principle of timing has compelled the current study to consider factors, such as the timing of life events or transitions (Elder, 1994) that influence development. In addition to generational membership, the study considers leaders' experience in the field based on the socio-historical time they began working in the IDD services sector.

3.1.2.1.5　Principle of Linked Lives

Researchers have noted that the application of life course theory in empirical research tends to focus on individual variates, rather than social factors and collective traits that impact development (Alwyn, 2012; Dannefer 1984; Featherman, 1983). To that end, researchers have recommended enhanced consideration of shared experience when using life course theory (Alwyn, 2012), a recommendation that this study addresses in the exploration of generations. Further, linked lives are central to the conceptualization of generations. Specifically, generations are defined by a group of people who share experiences and perspectives related to significant socio-historical periods and events (Mannheim, 1952).

3.1.3   The Relevance of Life Course Theory to the Current Study

As the discussion above demonstrates, life course theory is a particularly relevant perspective for the examination of generational differences in leadership behaviors. Critiques of life course theory application have called out research designs that do not give enough attention to the social and historical context in the study design (Alwyn, 2012). However, the field of intellectual and developmental disabilities services has changed so much over the past few decades; it is crucial to address social and historical context. Rapid changes in services and disability policy have necessitated a shift in the behaviors of leaders working in agencies that provide, regulate, and advocate for services and supports. For the current study, socio-historical factors are central to the design.

Scholars and professionals have agreed that more empirical knowledge about IDD service sector leaders will improve the quality of services available to people with intellectual and developmental disabilities and their families (Amado et al., 2013; Bailey & Gilden, 2018; Thompson-Brady et al., 2009). However, a corresponding body of literature has not grown substantially in the past few decades. This study begins to meet that need. Ultimately, the study informs the application of life course theory in research design as it addressed the historical and social factors that impact leaders' perspectives.

3.2   Behavioral Leadership Approach

This study also utilized a behavioral approach to guide the exploration of leadership practices. While Northouse (2019) recognized that a behavioral approach "is not a refined theory that provides a neatly organized set of prescriptions for

effective leadership behavior…" (p. 80), it does offer a broad framework from which to categorize leadership actions.

Northouse (2019) contended that utilizing a behavioral approach in current studies of leadership is appropriate, given the evolution of leadership research over time. The behavioral approach indicates progression from earlier frameworks that tended to explore leadership traits (including personality and inherent characteristics) and skills (including capabilities and personal strengths). These frameworks focused less on the adaptable attributes of leadership (Northouse, 2019). A behavioral approach, on the other hand, shifted the focus of researchers to investigate practices that leaders can learn and adapt to effectively lead their teams and organizations (Katz & Kahn, 1951). Modern leadership scholars have generally agreed that approaching leadership as a developmental process benefits leader (Bennis, 2007; Day et al., 2014) and the teams and organizations for whom they work (Day & Sin, 2011).

3.2.1 Early Contributions to the Behavioral Approach

The behavioral leadership approach developed from three studies conducted in the mid-20th century: The Ohio State Studies, the University of Michigan Studies, and Blake and Mouton's Managerial (Leadership) Grid. These studies broke away from traditional approaches (trait and skill-based) to consider the demonstrable leadership practices that lead to successful individual, team, and organizational outcomes (Blake & Mouton, 1964; Hemphill, 1949; Hemphill & Coons, 1957; Katz & Khan, 1951).

3.2.1.1 The Ohio State Studies

The Ohio State Studies (Hemphill, 1949; Hemphill & Coons, 1957; Stogdill, 1974) were designed to examine leadership behaviors from the perspective of

subordinates who identified the number of times leaders demonstrated certain leadership practices. Seminal findings from these studies showed that leadership practices tend to cluster around two primary types of leadership behaviors, initiating structure behaviors, and consideration behaviors (Stogdill, 1974).

Initiating structure behaviors are focused on the leader and describe individual leadership actions and tasks that benefit an organization and team. These include practices and behaviors such as scheduling, maintaining performance standards, and implementing operational processes that improve organizational performance. Consideration behaviors are focused outward and describe relational leadership actions. These include behaviors and practices that impact interpersonal relationships between a leader and a team, including treating others with respect and keeping open lines of communication.

The two clusters, initiating structure and consideration behaviors, provided a conceptual foundation for the behavioral approach to leadership in research. Ultimately, the differentiation of initiating structure behaviors and consideration behaviors influenced the often-repeated research practice of differentiating between task (individually focused) and relational (interpersonal focused) leadership behaviors.

3.2.1.2 The University of Michigan Studies

The University of Michigan Studies (Katz & Kahn, 1951) focused on leaders' behaviors as they related to and interacted with others (Cartwright & Zander, 1970; Likert, 1961). Findings from this study also clustered around two types of leadership behaviors (Bowers & Seahorse, 1966). Employee orientated behaviors were demonstrated by practices that valued and attended to the needs of subordinates. Production oriented behaviors were demonstrated by practices that emphasized the

productivity of subordinates (Bowers & Seahorse, 1966). These behavioral categories conceptually parallel those of the Ohio State Studies (Stogdill, 1974). Employee orientation behaviors align with consideration or task-focused behaviors, and production orientation behaviors align with initiating structure or interpersonal behaviors.

Early researchers leading the University of Michigan Studies attempted to place each of the behavioral categories on opposite ends of a continuum. They hypothesized that leaders would more prominently demonstrate one or the other (Northouse, 2019). However, Kahn (1956) found that the application worked better when both types of behavior were observed independently on two parallel continuums. These findings have enhanced the behavioral approach to leadership, as they demonstrate the possibility and even the benefit of concurrent task-oriented and interpersonal leadership behaviors (Misumi, 1985).

3.2.1.3   Blake and Mouton's Leadership Grid

Later, Blake and Mouton's Leadership Grid (Blake & Mouton, 1964, 1978, 1985) provided a behavioral model to explain how leaders help organizations achieve their purpose. The Leadership Grid identified two categories of leadership behaviors, concern for production and concern for people. The behaviors identified in the Leadership Grid aligned with those described in both the Ohio State Studies and the University of Michigan Studies. Like Kahn (1956), Blake and Mouton (1964) did not approach concern for production and concern for people as mutually exclusive behaviors. Instead, they developed a model that considered the different combinations of leadership practices (Blake & McCanse, 1991). These findings further contribute to the behavioral approach to leadership as they offer a model from which to observe

distinct types of leadership practices in combination (such as high-task-oriented and high-interpersonal leadership behaviors or low-task-oriented and low-interpersonal leadership behaviors).

3.2.2 Key Characteristics of the Behavioral Leadership Approach

Ultimately, the behavioral approach to leadership emphasizes the actions of leaders, "focusing exclusively on what leaders do and how they act" (Northouse, 2019, p. 73). Using this approach, conceptualizations of task behaviors and relationship behaviors have evolved from the studies outlined above. Task behaviors and relationship behaviors are differentiated by behaviors that "facilitate goal accomplishment" and behaviors that "help followers feel comfortable with themselves, with each other and with the situation in which they find themselves," respectively (Northouse, 2019, p. 73). Researchers have explored both behaviors concurrently to understand situational leadership practices and their contribution to follower, team, and organizational outcomes (Littrell, 2013; Northouse, 2019).

3.2.3 Recent Contributions of the Behavioral Leadership Approach

Although the explicit use of the Behavioral Leadership Approach has waned over time (Judge et al., 2004), the framework has remained relevant in leadership literature. A 2004 validation study of the Consideration and Initiating Structure leadership behaviors from the Ohio State Studies found that the concepts were valid and relevant in current (at the time) literature, although they were underutilized in the application of leadership theories (Judge et al., 2004). Furthermore, in their analysis of the use of leadership theory in psychological research over time, Lord, Day, Zaccaro, Avolio, and Eagly (2017) described the evolution of leadership scholarship, noting

that the backlash to trait and characteristic based leadership has lessened over time. In particular, they found that more recent leadership theories, such as transformational leadership, transactional leadership, and social exchange theory in leadership, have incorporated the study of both behaviors and traits in their approaches. They concluded that although fewer studies use only a behavioral leadership approach, many elements of behavioral leadership have influenced the formation of these more recently developed leadership theories. For instance, current leadership literature relies heavily on principles identified in the behavioral leadership approach, particularly the differentiation of task vs. relational leadership practices.

Lord and colleagues' (2017) conclusion is supported by current research findings, some of which have been outlined in Chapter Two. Many leadership studies focus on the behaviors and practices that yield impactful results for leaders' careers, teams, and organizations (e.g., Friedrich, Griffith, & Mumford, 2016; Lanaj, Johnson, & Lee, 2016; Winston & Fields, 2015). For instance, in their study of collective leadership, Fredrich and colleagues (2016) differentiated organizational issues by relationship-based and task-based, assessing the use of specific practices and traits on the two types of problems.

3.2.4   Strengths of the Behavioral Leadership Approach

The behavioral leadership approach offers three primary strengths, establishing it as a legitimate approach in leadership literature:

1. The behavioral leadership approach is broad, providing a "conceptual map that is worthwhile to use in our attempts to understand the complexities of leadership" (Northouse, 2019, p. 81). This approach is particularly useful in relatively unexplored areas of study. The approach offers a structured, yet heuristic framework from which to

examine the factors that are pertinent to leadership in the IDD services sector;

2. Several studies of leadership behaviors have validated the behavioral leadership approach (e.g., Blake & McCanse, 1991; Bowers & Seahorse, 1966; Judge et al., 2004; Stogdill, 1974). In particular, the two categories of behavioral leadership (task and relationship behaviors) have been tested and retested in various contexts. Both types of leadership behaviors are consistently predictive of leader success (Littrell, 2013); and,

3. The behavioral approach assumes that leadership is a developmental process (Northouse, 2019), recognizing that leaders can learn and refine specific behaviors that will benefit their teams and organizations. The developmental nature of leadership has been substantiated in leadership literature (Day et al., 2014; Day & Sin, 2011). It also parallels the principles of life course theory in its assumption that development is lifelong. A developmental approach to leadership is also particularly appropriate for this study as the sample includes leaders who are participating in a weeklong leadership development program.

3.2.5   Limitations to the Behavioral Approach

While there are several strengths to a behavioral leadership approach, critics have also identified issues related to its application. For instance, researchers have argued that the behavioral approach has not sufficiently connected leadership behaviors with outcomes (Bryman, 1992; Yuki, 2003). Yuki (2003) contended that studies have yet to consistently demonstrate the link between specific leadership practices and individual, team, or organizational performance. Similarly, researchers have not identified universal leadership practices that lead to team and organizational success (Northouse, 2019). Research from Martin and colleagues (2012) indicated, however, that this may be a futile goal. They found that the effectiveness of leadership behaviors varied by the context in which they were practiced. Martin and colleagues

(2012) concluded that more studies of leadership behavior need to consider the contextual factors that influence the interaction between leaders and followers.

Furthermore, Griffin (1979) has suggested that investigating the direct impact that leadership behavior has on followers, teams, and organizations might not even be appropriate. Griffin (1979) postulated that leadership behaviors are instead moderating variables between "individual- task congruence" and job satisfaction (p. 215). "Individual- task congruence is characterized by the alignment between an employee's required tasks and professional goals and interests (Griffin, 1979, p. 215). Griffin (1979) maintained that a behavioral approach could place too much emphasis on the power of a leader, while not sufficiently accounting for the role that followers have in their performance and outcomes.

Overall, these limitations highlight the need for additional research examining leadership behaviors in context; specifically, studies that make a more apparent connection between theory and design.

3.2.6 Applications of the Behavioral Approach to the Current Study

The behavioral leadership approach not only remains relevant for the current study, but it heeds the call of Judge and colleagues (2004) to incorporate the approach in current leadership literature. Moreover, the behavioral approach to leadership is a particularly apt framework for the current study as its core focus parallels the concepts measured in this project.

Specifically, the current study employs a secondary data analysis of results from the Leadership Institute Survey, a survey designed to measure the experiences and behaviors of current and emerging leaders working in the intellectual and developmental disabilities service sector. The survey assesses three aspects of

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leadership behaviors; two individual types of leadership behavior and one interpersonal aspect. Because the current study measures only the behaviors and practices of leaders working in the IDD service sector, the behavioral leadership approach is more appropriate than more recent theories that consider leadership traits and characteristics.

Investigating the behaviors of leaders in the IDD service sector will be a first and vital step towards understanding how leaders impact quality services and supports. Moreover, although the study of generations is robust, there is a notable lack of focus on the actual similarities and differences in leadership behaviors (Becton, Walker, & Jones-Farmer, 2014). The question remains, although there are generational differences in leaders' workplace expectations and attitudes (Twenge, 2010), do they behave differently?

Organizational leaders determine and manage the priorities and practices of an organization. Exploring the generational differences in IDD service sector leaders' behaviors will inform researchers, trainers, and organizational leaders of useful strategies to develop and support leaders. Targeted efforts can inform the design of training and development opportunities for IDD service sector leaders. Research findings will identify the support and training leaders need to be effective in their roles. Ultimately, findings from this study can enhance knowledge about leadership practices that promote choice, autonomy, and control in services for people with intellectual and developmental disabilities and their families.

Chapter 4

METHODOLOGY

4.1 Research Questions

The culmination of research and socio-historical information outlined in the previous chapters justifies the current study. Ultimately, IDD service sector leaders are the people who will continue to design, develop and oversee the implementation of the services and supports on which people with disabilities and their families rely (Thompson-Brady, 2009). These findings demonstrate a clear need to understand the behaviors of leaders working in agencies that provide, regulate, and advocate for services and supports for people with intellectual and developmental disabilities and their families.

Further, several factors may impact how leaders approach their work, factors about which the IDD service sector knows very little. These factors include generational membership (Anderson et al., 2017; Tolbiz, 2008) and professional experience in the IDD service sector (Minnesota Governor's Council on Developmental Disabilities, 2019). This study considered both factors.

4.1.1 Exploring Leadership Experience in the IDD Service Sector

In addition to generational differences, this study explored the effect that the amount of professional field experience has on leadership behaviors. Including the

amount of professional field experience in the design of this study addressed two

pervasive issues in previous studies of generations:

1. Researchers' tendency to assign generational boundaries without
    considering the complex and multifaceted factors that influence human
    development and behavior (Rudolph et al., 2018; Rudolph & Zacher,
    2017); and,

2. Lack of connection between theory and methodology that threatens the
    validity of the findings of many generational publications (Costanza et
    al., 2012)

4.1.2 Research Questions

Ultimately, this study was designed to understand differences in intellectual

and developmental disabilities (IDD) sector leaders' behaviors. The following

research questions were explored:

1. Are there differences in IDD sector leaders' self-reported behaviors,
    based on the generation to which they belong?

2. Are there differences in IDD sector leaders' self-reported behaviors,
    based on the amount of professional experience they have in the IDD
    sector?

4.2 Conceptual and Operational Properties of the Variables Explored

For this study, independent variables included: generation and amount of

professional field experience. Dependent variables included: self-reported leadership

behaviors. Three domains categorized leadership behaviors, personal leadership

behaviors, personal management behaviors, and relational leadership behaviors. The

conceptual and operational properties of the variables are described below.

4.2.1 Independent Variables

4.2.1.1 Generations

Generational boundaries were defined using the birth year cutoffs adopted by the Federal Government, specifically the US Census Bureau (Colby & Ortman, 2014) and Bureau of Labor Statistics (2018). Definitions for more recent generational cohorts (millennials and Generation Z) were adopted from the Pew Research Center (2019b) as they are a nationally respected research group. The Pew Research Center is also one of the first to identify and operationalize generational differences for people born in 1981 and after. Table 3 shows how generational boundaries were defined in the study (as well as the federal or national source that informed how the cutoffs were determined). Generations that are bolded in Table 3 represent the generations observed in the current study.

This study included generations represented in the sample, baby boomers, Generation X, and millennials. These three generations also represent the majority of the current workforce. Although some members of the Silent Generation continue to work, no one in the sample was born before 1946. Similarly, members of Generation Z are beginning to enter the workforce; however, they have been excluded from this study as no one in the sample was born after 1997.

Table 3 *Generational Boundaries*

Generation	Birth Years	Source
Greatest Generation	1927 and before	Bureau of Labor Statistics, Pew Research Center
Silent Generation	1928 to 1945	Bureau of Labor Statistics, Pew Research Center
Baby Boom Generation	**1946 to 1964**	**Bureau of Labor Statistics, U.S Census Bureau, Pew Research Center**
Generation X	**1965 to 1980**	**Bureau of Labor Statistics, Pew Research Center**
Millennial Generation	**1981 to 1996**	**Pew Research Center (Bureau of Labor Statistics has not yet defined a cut off for this generation)**
Generation Z	1997 and after	Pew Research Center (no cutoff defined yet)

4.2.1.2   Amount of Professional Experience in the IDD Services Sector

The amount of professional field experience has been operationalized by the time in which a fundamental transition occurred in leaders' lives, entry into the intellectual and developmental disabilities service sector. Transitions are of particular interest in the study of human development as they influence developmental outcomes

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and experiences (Elder et al., 2003). This factor was chosen as it provided insight into the interaction between an individual's leadership practices and the social and political expectations of service design and delivery prevalent in the IDD services sector.

Specifically, the socio-historical context in which leaders entered the field was used. The years 1990 and 2000 were selected as delineators. As such, the sample was split by leaders who entered the field before 1990, between 1991 and 1999, and 2000 and after. These dates were selected because they mark significant events in the socio-historical context of the IDD services sector.

In 1990, the passage of the Americans with Disabilities Act (1990) marked an historic turning point in the social and political understanding and treatment of people with intellectual and developmental disabilities in the United States (Minnesota Governor's Council on Developmental Disabilities, 2019; Silverstein, 2000; Turnbull et al., 2007). The 1999 Olmstead Supreme Court Decision inspired significant progress towards community-based services and inclusion as it instigated state funding and technical assistance initiatives to support nationwide deinstitutionalization (Zubritsky, Mullahy, Allen, & Alfano, 2007).

4.2.2 Dependent Variables: Leadership Behaviors

The dependent variables, leadership behaviors, were operationalized by self-reported leadership behaviors that parallel the primary characteristics of the behavioral approach to leadership. Leadership behaviors were defined by three latent variables: personal leadership behaviors, personal management behaviors, and relational leadership behaviors. These variables were determined by the results of an exploratory factor analysis on the Leadership Institute Survey (described below).

4.2.2.1   Personal Leadership Behaviors

Personal leadership behaviors describe individual practices that leaders employ to support the work of a team or an organization. These behaviors align with the task-based behaviors within the behavioral leadership approach and reflect the leadership factors measured on validated metrics of task-based behaviors (Blake & McCanse, 1991; Stogdill, 1963).

4.2.2.2   Personal Management Behaviors

Personal management behaviors describe individual behaviors that leaders employ to manage their progress related to the achievement of specific goals. This factor also aligns with task-based behaviors within the behavioral leadership approach, focusing more on practices that promote the personal attainment of goals. The behaviors related to personal management behaviors also reflect factors measured on validated metrics of task-based behaviors (Blake & McCanse, 1991; Stogdill, 1963).

4.2.2.3   Relational Leadership Behaviors

Relational leadership behaviors describe the interactive behaviors that leaders employ with co-workers, teams, and people in their organization. This factor aligns with the behavioral leadership approach as well, reflecting relationship-based leadership behaviors that support the productivity and success of co-workers and followers. Practices related to relational leadership behaviors also reflect factors measured on validated metrics of relationship-based behaviors (Blake & McCanse, 1991; Northouse, 2019; Stogdill, 1963).

4.3   Sampling

4.3.1   Description of Leadership Institute Participants

As a requirement for participation, all Leadership Institute attendees are adult professionals working in the intellectual and developmental disabilities service sector. The average age of the Leadership Institute participants is 43. Most Leadership Institute attendees work in agencies that directly provide services and supports to people with IDD and their families (58.9%). Leaders also represent city/county (2.2%) state (6.0%) and federal (.5%) government agencies, University Centers for Excellence in Developmental Disabilities (19.1%), Developmental Disability Councils (2.2%) and advocacy agencies (3.4%).

Most Leadership Institute participants represent traditional leadership roles. Twenty-five percent (24.8%) of participants work in executive leadership roles, 34.7% work in director roles, and 26.5% work in supervisory or management roles. However, the National Leadership Consortium does not limit participation to people in those roles. Participants have also included consultants (1.5%), Direct Support Professionals (2.5%), researchers (5.3%), advocates (1.5%) and 'other' roles (3.2%).

4.3.2   Sampling Qualifications

The sample for the current study included 446 leaders who met three qualifications:

1.   Respondents were from the United States;

2.   Respondents are currently working in the IDD services sector; and,

3.   Respondents have attended a Leadership Institute in the United States between January 2017 and May 2019.

Responses were limited to this timeframe for several reasons. First, generational representation during this time frame was more varied than in previous years. More millennials have attended the Leadership Institutes in recent years, causing the distribution across generations to be more consistent. Second, respondents shared contextual experiences as they were all working in the IDD service sector after the 2016 election.

The 2016 election has had a significant and rapid impact on the work of IDD service sector leaders. As early as March 2017, the current administration began developing and proposing bills that would substantially alter and cut funds for disability services (e.g., The American Health Care Act, 2017; The Health Care Freedom Act, 2017). Although many of the proposed bills have, to date, failed to pass, they are indicative of a new era in the federal IDD service sector.

Under the previous federal administration, the Centers for Medicare and Medicaid (CMS) developed and implemented the Home and Community Based Services regulations and related guidelines (2014). These HCBS regulations raised the standards of community-based services. Ultimately, the HCBS regulations were designed to assure that people with intellectual and developmental disabilities have access to services that offer personal control, autonomy, and access to their chosen communities. The 2014 regulations also required state transition plans outlining state strategies to assure and monitor compliance with the 2014 regulations by 2019.

In 2017, under the current administration, CMS granted an extension period for compliance to 2022. In 2019, CMS amended guidelines for compliance, relaxing some of the standards that agencies have to meet to receive HCBS funds. For example, CMS withdrew a list of service settings that were previously considered inherently

institutional and, therefore, not community based (Centers for Medicaid and Medicare Services, 2019).

At the same time, the number of national rallies and protests by and with people with disabilities has risen. For example, ADAPT, an advocacy organization of people with disabilities, has received national media attention. In July 2017, dozens of self-advocates were arrested while staging a sit in to protest Senate Republicans' vote to proceed with debates to repeal and replace the Patient Protection and Affordable Care Act (2010). Their protests were widely publicized.

To date, no studies have been published examining the experiences of IDD service sector leaders after the 2016 election. However, similar studies have been conducted in other fields. For instance, Crandall, Miller, and White (2018) explored incidences of prejudice one month before and five days following the election.

4.3.3 Sample Description

The sample included past Leadership Institute participants who attended a Leadership Institute between January 2017 and May 2019; this included 440 leaders who were eligible to participate in the current study before data reduction. At the time of the Leadership Institute, these 440 participants were between the ages of 24 and 72 (m=47.2), representing the baby boom generation, Generation X, and the millennial generation. While there was not an equal distribution of participants across generations, Table 4 shows that each generation was well represented in the study.

Table 4 *Sample Distribution by Generation*

Generation	N (%)	%
Baby Boomers	117	26.6%
Generation Xers	219	49.8%
Millennials	104	23.6%

Participants in this study also represented a range in years of experience in the intellectual and developmental disabilities sector; entry dates spanned from 1970 to 2018 (m=19.39 years' experience). Again, the sample was grouped by the amount of time participants have worked in the field. Time was marked by the passage of the Americans with Disabilities Act and the Olmstead Decision. Most people in the sample entered the field after the Olmstead Decision. Table 5 shows the distribution of time that leaders began working in the IDD sector.

Table 5 *Year Participants Entered IDD Sector*

Year Entered the IDD Sector	N	%
Before 1990	79	18.0%
Between 1990 and 1999	117	26.6%
2000 and after	244	55.5%

Respondents primarily worked in agencies that provide direct services and supports for people with intellectual and developmental disabilities and their families (n=253). Of the 45% that did not work in a provider agency, respondents also represented resource coordination/ case management agencies (n=26), state agencies/ departments (n=23), University Centers for Excellence in Developmental Disabilities (n=9), Developmental Disabilities Councils (n= 5) and Managed Care Organizations (n=5). Three or fewer people represented the following types of agencies: associations, consulting and training agencies, protection, and advocacy agencies, and self-advocacy organizations.

Most leaders held traditional leadership roles including executive leadership (n=79), director (n = 162) and managerial and supervisory (n = 63) positions. Other positions in which five or fewer people worked included coordinators (non-managers), consultants, administrators, specialists, staff development/ trainers, and board members.

4.4   Instrumentation

4.4.1   Description of Leadership Institute Survey

This study, a secondary data analysis, utilized data from the National Leadership Consortium on Developmental Disabilities' survey of IDD service sector leadership, The Leadership Institute Survey. The Leadership Institute Survey was designed to support the longitudinal study of the impact of the Leadership Institutes. Specifically, the survey was created in 2008 as a tool to assess the impact of the Leadership Institutes on leaders':

- Leadership skills and behaviors;

- Opportunity to impact change in their organization; and,

- Attitudes and beliefs about services and supports for adults with intellectual and developmental disabilities.

The entire survey tool includes 71 scaled and open-ended questions, the majority of which are derived from four previously validated tools, "The Revised Self Leadership Questionnaire" (Houghton & Neck, 2002), "The Role Efficacy Scale" (Pareek, 1980), "The Leadership Dimensions Survey" (Miller, 1999) and "The Community Living Attitudes Scale towards Mental Retardation" (Henry, Keys, Jopp, & Balcazar, 1996b).

"The Revised Self Leadership Questionnaire" (Houghton & Neck, 2002) was published and validated in the *Journal of Managerial Psychology* as an adapted measure of self-leadership processes and practices. Both "The Role Efficacy Scale" (Pareek, 1980) and "The Leadership Dimensions Survey" (Miller, 1999) were published in *Pfeiffer's Classic Inventories*, a collection of questionnaires and surveys that address the training and development of leaders. "The Community Living Attitudes Scale towards Mental Retardation" (CLAS-MR) (Henry et al., 1996b) was published in the *Journal of Mental Retardation* as a measure to be used to understand attitudes of different samples about the ability of people with IDD to participate in the community. Each scale is described in detail below.

4.4.1.1   The Revised Self Leadership Questionnaire

"The Revised Self Leadership Questionnaire" measures self-leadership processes and practices, specifically focusing on three self-leadership dimensions: "behavior focused strategies," "natural reward strategies," and "constructive thought

pattern strategies" (Houghton & Neck, 2002, p. 677). Questions are asked using a 5-item Likert scale from "not at all accurate" to "completely accurate."

An exploratory factor analysis conducted by Houghton & Neck (2002), yielded 9 factors, or subscales within each of the three dimensions, including: "self-goal setting" (5 items); "self-reward" (3 items);" "self-punishment" (4 items); "self-observation" (4 items); "self-cueing" (2 items); "focusing thoughts on natural rewards" (5 items); "visualizing successful performance" (5 items); "self-talk" (3 items); and, "evaluating beliefs and assumptions" (4 items) (p. 677). The Leadership Institute Survey uses 11 questions from the original "Revised Self Leadership Questionnaire," measuring self-goal setting (5 items), self-cueing (2 items), and self-observation (4 items). For this study, "The Revised Self Leadership Questionnaire" items had a Cronbach's $\alpha = .885$ at the time of the pre-survey.

4.4.1.2   The Role Efficacy Scale

"The Role Efficacy Scale" (Pareek, 1980) measures "the integration of individuals and their roles" (p. 207). The survey was designed to investigate leadership efficacy in context. Questions are asked using a 3 item scale, to which participants can select a, b or, c for each question. Items were originally scored on a -1, +1, and +2 scale, and included ten dimensions of role efficacy, measured by two items each. The Leadership Institute Survey includes five of the ten dimensions for a total of ten questions (of the original twenty). The dimensions include "centrality vs. peripherality, creativity vs. routinism, superordination vs. deprivation, influence vs. powerlessness, and growth vs. stagnation." The original dimensions were scored together for a total efficacy score; reliability ($\alpha=.68$) and validity (.80). The measure has been published in several articles from the *Indian Journal of Industrial Relations*

(e.g., Chauhan & Chauhan, 2007; Pethe & Chaudhari, 2000). For this study, "The Role Efficacy Scale" items had a Cronbach's α= .742, at the time of the pre-survey.

4.4.1.3   The Leadership Dimensions Survey

"The Leadership Dimensions Survey" (Miller, 1999) measures four dimensions of leadership competency: profound knowledge, profound strategy, purposeful direction, and purposeful behaviors. Questions on "The Leadership Dimensions Survey" are asked using a five-item Likert scale, ranging from "Not at all accurate" to "Completely accurate." The Leadership Institute Survey uses 31 of the original 32 questions. One question related to profound knowledge has been omitted. Creators of the Leadership Institute Survey did not believe it was relevant to IDD service sector leaders. For this subscale, Cronbach's α =.896 at the time of the pre-survey.

4.4.1.4   The Community Living Attitudes Scale

"The Community Living Attitudes Scale Towards Mental Retardation" CLAS-MR) (Henry et al., 1996b) was developed to measure the attitudes about the ability of people with IDD to participate in the community. The scale measures peoples' attitudes and beliefs about the rights and abilities of people with IDD to live in and participate in their communities. The original measure (40 questions in total) included subscales regarding values of empowerment (13 items), exclusion (eight items), sheltering (seven items), and similarity (12 items). The entire measure had retest reliability, using Cronbach's alpha, of over .7, and correlations between scales of r=.57 (Henry et al., 1996a).

The National Leadership Consortium survey includes eight items from the empowerment (five items) and sheltering (three items) subscales. These questions were selected because they address the attitudes and beliefs about the services, supports, and opportunities available to people with intellectual and developmental disabilities. Questions on "The Community Living Attitudes Scale" are asked using a 5-item Likert scale ranging from "Not at all accurate" to "Completely accurate." For this dimension, Cronbach's $\alpha=.575$ at the time of the pre-survey.

Questions on "The Community Living Attitudes Scale" were updated slightly from their original format to ask about people with intellectual and developmental disabilities rather than for people with mental retardation. Historically, people with intellectual disabilities have been described using pejorative terminology, mental retardation. However, this terminology perpetuates stigmatization and exclusion of people with intellectual disabilities and has been used to promote discriminatory behavior against people with any disability for decades. In 2009 an international movement and campaign, *Spread the Word to End the Word*, was formed by Timothy Shriver, Jr., and Soren Polumbo to formally change the language used to describe people with intellectual disabilities. These efforts led to the development and signing of Rosa's Law (2009) by President Obama in 2010. Rosa's Law mandated that the phrase 'mental retardation' was changed to 'intellectual disability' in all federal statutes and documents.

4.4.1.5 Leadership Effectiveness

Finally, leaders were asked to rate their leadership effectiveness on a scale from one to ten. This question was added to the survey to understand how effective leaders feel in their leadership roles. This question was developed and added to the

survey by the National Leadership Consortium on Developmental Disabilities research team in 2008.

4.4.2 Exploratory Factor Analysis

As described above, the Leadership Institute survey is a composite of a selection of four survey tools intended to measure the leadership skills, behaviors and attitudes, and beliefs towards adults with IDD. An exploratory factor analysis (EFA) was conducted to determine the latent leadership variables measured. For this study, exploratory factor analysis was ideal as it determines the maximum amount of common variance measured within the survey while narrowing the number of explanatory constructs (Field, 2018).

Scholars have proposed several recommendations regarding the sample size needed to run an exploratory factor analysis. According to Comrey (1988), a sample size of 200 is reasonable. Comrey and Lee (1992) later refined that recommendation, indicating that 100 subjects is poor, 200 is fair, 300 good, 500 very good, and 1,000 or more excellent. Monte Carlo investigations (Velicer & Fava, 1998) offer a more complex set of standards, taking into consideration sample size, number of variables, size of loadings and the number of variables per factor; they suggest a sample size of 100 is only sufficient when a factor has 4-5 salient variables, and communalities are at least .7 or higher, on average. A sample of 200 or more is needed when there are fewer salient variables or lower communalities. In general, Field (2018) concludes that a sample size of 300 will produce a stable factor solution. The current sample yielded 303 respondents, indicating that the sample size was sufficient.

Principal axis factor analysis was employed as it is tolerant of multivariate nonnormality and nonrandomized samples, and has the capacity to recover weak

factors (Briggs & MacCallum, 2003; Cudeck, 2000; Fabrigar, Wegener, MacCallum, & Strahan, 1999). Principal axis factor analysis is appropriate for this exploratory study seeking to develop a preliminary understanding of IDD service sector leaders. However, the generalization of these findings to other populations will require replication of the factor analysis. Communalities were estimated through squared multiple correlations and were iterated to produce final communality estimates (Gorsuch, 2003). Because retained variables were correlated, a Promax rotation was employed with k = 4 (Tataryn, Wood, & Gorsuch, 1999).

The primary function of an EFA is to determine the correct number of factors to retain and rotate (Fabrigar et al., 1999). The most common rule is to retain factors when eigenvalues are > 1.0; this is the default criterion in most statistical software. The shortcoming is that implementation of solitary criteria tends to under- or overestimate the number of true latent dimensions (Gorsuch, 1983; Velicer, Eaton, & Fava, 2000; Zwick & Velicer, 1986). Accordingly, each model was evaluated against the following six rules:

1. Eigenvalues greater than 1.0 (Kaiser, 1960);

2. Glorfeld's (1995) extension of parallel analysis (PA; Horn, 1965);

3. Minimum average parcels (MAP; Velicer, 1976);

4. High internal consistency (an alpha coefficient of > .70) for unit-weighted factors (Gregory, 2007; Reynolds, Livingston, & Willson, 2006; Salvia, Ysseldyke, & Bolt, 2007);

5. Invariance across models as per Wood, Tataryn, and Gorsuch's (1996) methodology; and,

6. Interpretability (Fabrigar et al., 1999; Gorsuch, 1983).

Results from several investigations demonstrated that MAP and PA are the two best methods for determining the correct number of factors to accept and that the scree test is a useful adjunct (Buja & Eyuboglu, 1992; Glorfeld, 1995; Velicer et al., 2000; Zwick & Velicer, 1986).
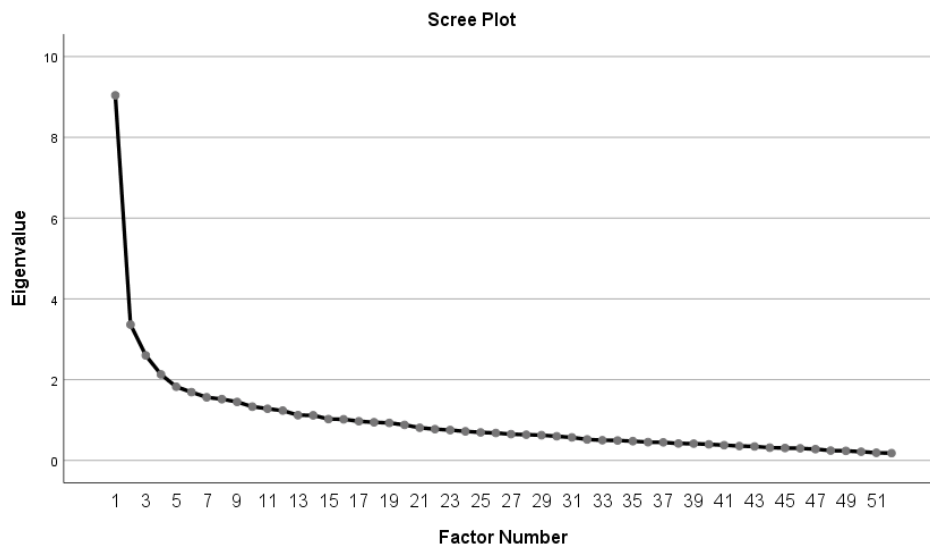
Figure 3 *EFA Scree Plot*

4.4.2.1   EFA Results

Results from Bartlett's Test of Sphericity (Bartlett, 1954) indicated that the correlation matrix was not random (χ^2= 6,615.0 df = 1830, p = .001). The Kaiser-Meyer-Olkin (KMO; Kaiser, 1974) statistic was .805, well above the .60 minimum suggested by Kline (1994), indicating that data is suitable for a factor analysis. (Table 6 presents means (Ms) and standard deviations (SDs) for the 61 Leadership Institute Survey variables submitted to the EFAs.) Two-, three-, four-, five-, and six-factor solutions were rotated. Kaiser's criterion suggests that 18 factors be retained, but the scree plot indicated between two and six (Figure 3). The PA and MAP indicated that a

six-factor solution was best. The five-factor solution satisfied requirements for simple structure in that variables showed appreciable factor loadings and no variables loaded on more than one factor (Field, 2005; Tabachnick & Fidell, 2007). Alpha coefficients revealed substantial internal consistency for the first three dimensions (respectively, .887, .885, and .763) while the alpha coefficient for the fourth and fifth factors (respectively, .660 and .453) fell below the .70 criterion (Kline, 1999). Therefore, the first, second, and third factors were analyzed in this study as they demonstrate reliability.

Table 7 displays the rotated pattern matrix for the five-factor solution, with the variables and factors selected for this study in bold (see the Appendix for full write up of each question asked). The five factors were interpreted according to the magnitude and meaning of their salient pattern coefficients. All coefficients greater than .45 were considered appreciable, as they have been deemed "fair" by Comrey and Lee (1992), accounting for 20% overlapping variance.

Comrey and Lee (1992) indicated that the higher the loading, the more likely it is that the variable is a pure measure of a factor. They categorize loadings over .71 (accounting for 50% overlapping variance) are excellent, .63 to .70 (accounting for 40% overlapping variance) are very good, .55 to .62 (30% overlapping variance) are good, .45 to .54 (20% overlapping variance) are fair and .32 to .44 (10% overlapping variance) are poor. They recommended that loadings under .32 are not included (Comrey & Lee, 1992; Field, 2018). Comrey and Lee (1992) also pointed out that loading requirements are a matter of researcher preference and depend on the design of the project and research questions. Therefore, for this study, only loadings over .45 were selected. Due to limitations inherent to the design of the survey tool, relatively

conservative boundaries were selected. Conservative boundaries provided greater assurance that the variables selected for the study truly measure each factor.

The first factor was characterized by variables that describe interactive leadership behaviors that directly impact co-workers and teams. These variables included 11 questions that originated from the Leadership Dimensions Survey. Consequently, the first factor was named relational leadership behaviors (Cronbach's α=.887).

The second factor was characterized by goal-oriented behaviors that leaders employ to manage their progress and productivity. These variables included ten questions that originated from the Revised Self Leadership Questionnaire. Consequently, the second factor was named personal management behaviors (Cronbach's α=.885).

The third factor was characterized by variables describing individual leadership practices that benefit leaders themselves, their teams, and their organizations. These variables also included seven questions from the Leadership Dimensions Survey. Consequently, the third factor was named personal leadership behaviors (Cronbach's α=.763). Reliability analyses showed that each of these factors met internal consistency standards of .7 or higher (Kline, 1999).

The fourth factor described leaders' self-perceptions of personal efficacy (including five questions originated from the Role Efficacy Scale), labeled role efficacy (Cronbach's α=.660). The fifth described leaders' attitudes and beliefs about best practices in services and supports for adults with IDD (including three questions from the Community Living Attitudes Scale, labeled attitudes and beliefs about services for people with IDD (Cronbach's α=.453). However, these factors did not

directly measure leadership behaviors, nor did they meet acceptable standards for internal consistency (Kline, 1999). Therefore, they were not used for this study. Ultimately, the EFA resulted in the selection of three factors that originated from two of the initial four measures of leadership, the Leadership Dimensions Survey and the Revised Self Leadership Questionnaire.

Table 6 *Means and Standard Deviations for the Leadership Institute Survey Variables*

Variable	M	SD
EstablishGoals[a]	4.04	.798
ConsciousGoals[a]	4.28	.697
TrackWork[a]	3.88	.894
WrittenNotes[a]	4.55	.736
WorktoGoals[a]	4.23	.744
AwarePerformance[a]	4.10	.688
FutureGoals[a]	4.19	.784
PayAttention[a]	4.33	.622
WriteGoals[a]	3.51	1.001
ConcreteReminders[a]	4.58	.708
TrackProgress[a]	4.16	.767
RoleImportant[b]	2.74	.481
RoutineWork[b]	2.79	.554
ContSociety[b]	2.45	.555
ContDecision[b]	2.56	.521
ContLearning[b]	2.60	.514
Schedule[b]	2.85	.426
CentralOrg[b]	2.63	.532
ContOrg[b]	2.30	.477
InfluenceDec[b]	2.71	.494
Learn[b]	2.81	.402
RateLeadership[e]	7.19	1.200
DescribeOrgFuture[c]	4.15	.898
LeadBehaviorAlign[c]	4.41	.824
AwareFieldDevel[c]	4.11	.950
ConsistentlyEthical[c]	4.72	.798
ClearOutcomes[c]	4.10	.879
SupportProjects[c]	3.80	1.19
SelfAccountable[c]	4.62	.739
AppealFutureVis[c]	3.93	1.000
PracticePreach[c]	3.95	.929

Table 6 *Continued*

SeekChallenge[c]	3.71	.967
EmpowerTeam[c]	4.12	.893
ChangeClarity[c]	4.53	.780
MonitorProjects[c]	3.48	.998
WellPrepared[c]	3.47	.864
Sincere[c]	4.84	.537
ClearCommunicate[c]	4.29	.871
RewardEfforts[c]	3.94	.913
TeamUnderstand[c]	3.83	.858
CreateTrust[c]	4.03	.837
ChangeResource[c]	4.45	.794
TakeRisk[c]	3.24	1.010
TechnicalLeadership[c]	4.73	.651
ShareGoodWork[c]	4.60	.770
JoinCommonVision[c]	3.73	.895
PersonalSacrifice[c]	4.69	.777
UnderstandInteract[c]	4.03	.974
Believable[c]	4.42	.785
UnderstandImpact[c]	4.34	.866
InnovativeLeaders[c]	3.77	.888
ChallengeStatQuo[c]	4.30	.861
TrustingRelationship[c]	4.38	.762
DecisionsDD[d]	3.92	1.171
GroupDD[d]	4.02	1.144
ControlDD[d]	3.97	.960
RightsDD[d]	3.91	1.182
ShelteredDD[d]	4.67	.669
BoardDD[d]	4.64	.847
LobbyDD[d]	4.76	.605
OpinionWeightDD[d]	4.43	.870

Note: N = 287

[a] Variables measured on the Revised Self Leadership Questionnaire
[b] Variables measured on the Role Efficacy Scale
[c] Variables measured on the Leadership Dimensions Survey
[d] Variables measured on the Community Living Attitudes Scale
[e] Variable measuring self-rated of leadership effectiveness

Table 7 *Rotated Pattern Matrix from the Leadership Institute Survey*

	Factor				
Variable	I	II	III	IV	V
CreateTrust[c]	**.834**				
EmpowerTeam[c]	**.748**				
PracticePreach[c]	**.739**				
AppealFutureVision[c]	**.683**				
TeamUnderstand[c]	**.667**				
JoinCommonVision[c]	**.597**				
RewardEfforts[c]	**.596**				
TrustingRelationships[c]	**.589**				
SeekChallenge[c]	**.550**				
Believable[c]	**.511**				
InnovativeLeadership[c]	**.495**				
WellPrepared[c]	.442				
MonitorProjects[c]	.432				
SupportProjects[c]	.411				
UnderstandInteracting[c]	.331				
WorktoGoals[a]		**.728**			
EstablishGoals[a]		**.726**			
WriteGoals[a]		**.724**			
ConsciousGoals[a]		**.688**			
TrackProgress[a]		**.677**			
ConcreteReminders[a]		**.658**			
TrackWork[a]		**.630**			
WrittenNotes[a]		**.602**			
PayAttention[a]		**.575**			
FutureGoals[a]		**.573**			
AwarePerformance[a]		.446			
ClearOutcomes[c]			**.694**		
LeadBehaviorAlignment[c]			**.632**		
UnderstandResources[c]			**.595**		

Table 7 *Continued*

DescribeOrgFuture[c]	**.588**		
UnderstandChangeImpact[c]	**.527**		
ChangeClarity[c]	**.527**		
ClearCommunicate[c]	**.469**		
ConsistentlyEthical[c]	.445		
SelfAccountable[c]	.403		
AwareFieldDevelopment[c]	.393		
Sincere[c]	.378		
ChallengeStatusQuo[c]	.359		
TechnicalLeadership[c]	.353		
CentralOrg[b]		.693	
Learn[b]		.592	
RoleImportant[b]		.581	
ContLearning[b]		.546	
InfluenceDec[b]		.523	
Schedule[b]		.439	
ContDecision[b]		.409	
RoutineWork[b]		.347	
LeadershipEffectiveness[e]		.343	
ContOrg[b]		.304	
OpinionWeightDD[d]			.537
BoardDD[d]			.468
ControlDD[d]			.457
ShelteredDD[d]			.447
LobbyDD[d]			.438
DecisionsDD[d]			.330

Note: N = 287.

[a] Variables measured on the Revised Self Leadership Questionnaire
[b] Variables measured on the Role Efficacy Scale
[c] Variables measured on the Leadership Dimensions Survey
[d] Variables measured on the Community Living Attitudes Scale
[e] Variable measuring self-rated of leadership effectiveness

Table 8 presents the strength of relationships among the selected three factors. The correlation between each factor is between .328 and .526, suggesting that the factors are oblique, meaning that they do share common variance. However, these results also show a low degree of redundancy, estimating that the two most correlated factors, relational leadership behaviors and personal leadership behaviors shared less than 30% of the variance.

Table 8 *Inter-correlations among the Five, Retained Factors*

	Personal Leadership Behaviors	Personal Management Behaviors	Relational Leadership Behaviors
Personal Leadership Behaviors	--		
Personal Management Behaviors	.328	--	
Relational Leadership Behaviors	.526	.379	--

Note: N = 287.

4.5   Data Collection

This project used data collected through an online survey administered before each weeklong leadership training (the Leadership Institute). Data was used from the participants of 14 Leadership Institutes held between January 2017 and May 2019. Between 15 and 45 people attended each Leadership Institute (m = 31). Out of the 446

Leadership Institute attendees, 331 surveys were collected before participation in the weeklong training, demonstrating a 74% overall response rate.

Responses from the pre-survey, collected before the Leadership Institute, were used. Only pre-survey data was selected to avoid the potential influence of the Leadership Institute on responses. Ultimately, this study did not seek to assess the impact of the Leadership Institutes. Instead, the study was designed to explore generational differences in leaders working in the IDD sector to better understand how to train, develop, and support them to lead.

4.6   Data Reduction

To conduct the data analyses, the total mean for each factor was calculated by combining the mean scores from each of the variables that loaded onto each of the three factors selected for the study: personal leadership behaviors, personal management behaviors, and relational leadership behaviors. Because all loading variables used the same 5-item Likert scale, the total mean for each dimension was calculated. Participant responses were included in the analysis if participants responded to each of the questions representing the loading variables. After exclusion, the sample size included 303 respondents.

Three cases were further removed to address issues related to homogeneity of variance in the data, an issue that violated the assumption of both analyses selected, the MANOVA and discriminant function analysis. Three cases were removed as they were "extreme" outliers, with z scores greater than the absolute value of 4 (Meyers, Gamst, & Guarina, 2006). Meyers and colleagues (2006) have suggested that "the discriminant analysis is robust to the violation of homogeneity of variance assumption,

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provided the data do not contain extreme outliers" (p. 270). Ultimately, 300 cases were included in the analyses.

4.7 Missing Data

A missing value analysis was conducted using SPSS to assess patterns of missing-ness in the data. The missing value analysis identifies where the missing values are located, how extensive the missing-ness is, whether or not pairs of variables have missing values in multiple cases, and whether or not they are missing at random. Descriptive variables, including generation, leadership role, time entered the field, and cohort were selected for the analysis as they are the variables of interest in this study.

4.7.1 Unit Nonresponse

Patterns of missingness related to participation in the survey (whether Leadership Institute participants responded to the survey or not) were examined to assess unit nonresponse (Dong & Peng, 2013). Specifically, patterns in response rates based on cohort, age, and leadership role were assessed. As noted previously, survey respondents represented 74% of the total sample; however, cohort-specific response rates ranged from 50% to 89%. No pattern for cohort nonresponse was identified; participants were not more or less likely to respond based on cohort-specific factors such as location and time of year. Similarly, no pattern for missingness was found based on age or leadership roles.

4.7.2 Item Nonresponse

To assess item nonresponse, patterns of missingness within the survey itself were also analyzed. Results indicated that the primary reason for missingness was due

to survey length; the rate of missing data ranged from 0% on early survey questions to 7.7% on later questions. The rate of missingness for the last ten questions of the survey was 6.8%, while for the first ten questions, it was .63%. According to Heberlein and Baumgartner (1978), survey attrition is common in long surveys and can increase the potential for nonresponse bias. However, Enders (2003) determined that having 15% to 20% missing data is acceptable in educational and psychological scholarship, indicating that the data used for this study was robust.

Further, after examining patterns of missing data related to generation, cohort, time entered the field and leadership role, it was determined that data are missing completely at random. These findings indicate that leadership experience and role are not factors that influence whether or not participants responded to questions on the survey (Graham, 2009).

4.8   Analysis

Two one-way between-subjects multivariate analyses of variance (MANOVA) were conducted to address the research questions listed above. The one-way between-subjects MANOVA assessed between-group differences on three dimensions of leadership behaviors, personal leadership behavior, personal management behavior, and relational leadership behavior. The MANOVA was chosen as the analysis accounts for correlations between the dependent variables as well as the relationships between the independent and dependent variables (Field, 2018). The MANOVA is also a commonly used analysis to assess generational differences in leadership values and behaviors (e.g., Arsenault, 2004; Yu & Miller, 2005).

Two separate MANOVAs were conducted as differences in the outcomes between the two analyses are of interest to this exploratory study. The first MANOVA

assessed the relationship between generation and leadership behaviors. The second MANOVA assessed the relationships between the amount of professional field experience and leadership behaviors. Both analyses were useful to test different assumptions about the impact of socio-historical time.

Additionally, two one way MANOVAs were selected as there was substantial overlap in the sample between the two independent variables. For example, everyone who was part of the millennial generation entered the field after the passage of the Americans with Disabilities Act in 1990. However, participants representing the baby boom generation and Generation X joined the field in all three eras, indicating that each analysis explores historical context differently. Table 9 shows the distribution of the sample between both types of independent variable groupings, generation, and the amount of professional field experience.

Table 9 *Sample Distribution by Two Types of Independent Variable Groupings*

| Generation | Experience | | | |
	Pre ADA	Between ADA and Olmstead	Post Olmstead	Total
Baby Boom Generation	43	17	24	84
Generation X	15	64	70	149
Millennial Generation	0	1	66	67
Total	58	82	160	300

4.8.1 Power Analysis

A priori power was assessed for a MANOVA (Faul, Erdfelder, Lang, & Buchner, 2007). Pillai's trace was utilized as the multivariate test statistic because it is robust (Bray & Maxwell, 1985; Olson, 1976; Stevens, 2002). Specifically, Pillai's trace can be employed when group sizes are unequal, which was the case in both types of grouping. Pillai's trace is also useful when there is a violation of the assumption of homogeneity of variance-covariance matrices, which occurred in both analyses (MacCallum, Roznowski, & Necowitz, 1992; Tabachnick & Fidell, 2007).

The significance level was set to $p = .05$ for the power analysis, as per standard scientific conventions. A medium effect size was postulated in keeping with Cohen's (1988) recommendations (i.e., $f^2 = .15$). Additionally, power was set to .80, meaning there would be an 80% probability of reaching statistical significance if the dependent variables had an effect on the population. Results from the power analysis showed that 57 cases were necessary for the multivariate test. For each MANOVA analysis, 300 cases were retained.

4.8.2 Discriminant Function Analysis

Following recommendations from the methodological literature regarding appropriate follow-up comparisons of significant MANOVAs (Borgen & Seling, 1978; Enders, 2003; Huberty, 1984; Huberty & Olejnik, 2006), a direct-entry discriminant function analysis was employed to evaluate the relative contribution of the dependent variables. Given three groups and three predictors, it was possible to obtain up to two discriminant functions (Field, 2005; Garson, 2019).

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Chapter 5

RESULTS

5.1 MANOVA Results

The MANOVA addressed whether leadership behaviors could be differentiated based on generational membership and the amount of professional field experience. Dependent variables for both analyses included the total mean scores of the three constructs described above: personal leadership behaviors ($M = 4.323$, $SD = .542$), personal management behaviors ($M = 4.180$, $SD = .525$) and relational leadership behaviors ($M = 3.99$, $SD = .583$). The independent variables on each analysis were generation and field experience (delineated by time at which leaders entered the field), respectively. Distributional statistics for the factor scores are presented separately for each group (see Tables 10 and 11).

Table 10 *Self- Reported Leadership Behavior Scores for the Generational Groups*

Leadership Behaviors	Baby Boomers* (n=84)		Generation X (n=149)		Millennials (n=67)	
	M	*SD*	*M*	*SD*	*M*	*SD*
Personal Leadership Behaviors	4.367	.522	4.375	.534	4.17	.564
Personal Management Behaviors	4.206	.527	4.119	.522	4.175	.513
Relational Leadership Behaviors	4.050	.601	4.00	.550	3.94	.521

Groups (N=300)

Table 11 *Self-Reported Leadership Behaviors Scores for the Amount of Field Experience Groups*

Leadership Behaviors	Pre ADA (n=58)		ADA to Olmstead (n=82)		Post Olmstead (n=160)	
	M	*SD*	*M*	*SD*	*M*	*SD*
Personal Leadership Behaviors	4.320	.548	4.382	.519	4.304	.553
Personal Management Behaviors	4.212	.454	4.099	.565	4.201	.504
Relational Leadership Behaviors	4.043	.530	4.057	.618	3.957	.534

Groups (N=300)

5.1.1.1 Assumptions

Most assumptions regarding the use of MANOVA were met, including the absence of univariate and multivariate outliers, linearity, and the absence of multicollinearity and singularity (Tabachnick & Fidell, 2007). Further, although there were skewness and kurtosis within the sampling distributions, the boundaries for both were not violated (i.e., skewness and kurtoses did not exceed the absolute values of 2 and 7, respectively) (West, Finch, & Curran, 1995). Skewness and kurtosis were also mitigated by the relatively large sample size (n=300). A statistically significant Box's test for the first analysis (independent variable = generation) (p= .005) indicated unequal variance-covariance matrices of the dependent variables across the three generations, and therefore, necessitated the use of Pillai's trace in assessing the multivariate effect (Stevens, 2002; Tabachnick & Fidell, 2007). The Box's test for the second analysis (independent variable = amount of professional field experience) was not significant (F=1.463, df [12, 153,617.472], p = .130); therefore, the assumption of multivariate homogeneity among the covariance matrices was satisfied.

Finally, the ratio of the largest-to-smallest groups was widely disparate for both analyses (see Tables 10 and 11 above), indicating unequal ns (Stevens, 2002). This disparity could influence the accuracy of the overall multivariate comparison (Stevens, 2002). The problem was again circumvented through the use of Pillai's trace (Meyers et al., 2006; Tabachnick & Fidell, 2007).

5.1.1.2 Analysis 1: Generations and Leadership Behaviors

The multivariate effect showed that leadership behaviors were significantly affected by generational membership (Pillai's Trace = .052, F = 2.639, df [6, 592], p = .016). To gain a preliminary understanding of the relationship between generation and

leadership behaviors, the MANOVAs were run three separate times, using Helmert, Difference, and Simple contrasts. Results from the contrasts show that self-ratings of leadership behaviors varied significantly by generation, however only on the factor of personal leadership behaviors. Results for personal management behaviors and relational leadership behaviors were not significantly different for generations. Further, contrast results indicated that membership in the millennial generation had the largest impact on differences in personal leadership behaviors.

Results from the Helmert contrast were only significantly different between level 2 (Generation X) and level 3 (millennials) (p= .012). The results from the Difference contrast were only significantly different between level 3 (millennials) and previous levels (Generation X and baby boomers combined) (p= .010). Results from the simple contrast were also significantly different between level 1 (baby boomers) and level 3 (millennials) (p= .019).

5.1.1.3   Analysis 2: Amount of Professional Field Experience and Leadership Behavior

Unlike generational membership, the multivariate effect showed that leadership behaviors were not significantly affected by the amount of professional field experience (Pillai's Trace = .025, F = 1.256, df [6, 592], p = .276). Table 12 shows the univariate comparisons for each variable, demonstrating the lack of significance in the relationship between the amount of field experience and each dependent variable analyzed. No further analyses were run examining this relationship.

Table 12 *Univariate Comparisons for Variables in the Second MANOVA Analysis:*
Amount of Field Experience

Variable	$F(2,297)$	*Significance*	*Partial ETA Squared*
Personal Leadership Behaviors	1.08	.341	.007
Personal Management Behaviors	1.27	.283	.008
Relational Leadership Behaviors	.566	.568	.004

5.1.2 Discriminant Function Analysis

A discriminant function analysis was performed to assess the nature of the relationship between generations and leadership behaviors. Two variates significantly discriminated the generational groups in combination (Wilks λ = .948, χ2 = 15.788, df [6], p = .015), but the second variate alone was not significant (Wilks λ = .996, χ2 = 1.041, df [2], p = .594). The two discriminant functions accounted for 4.84% and less than 1%, respectively, of the between-group variability. The construct identified by the first function represented a very small effect size; the second latent variable was too small to consider (Mendoza, Markos, & Gonter, 1978; Stevens, 2002).

Constructs identified by the two functions were interpreted using pooled within-groups correlations, as well as standardized discriminant function coefficients (see Table 13) (Huberty & Olejnik, 2006; Thompson, 2000). Using criteria established by Comrey and Lee (1992), the pattern of correlations for the first dimension showed a high loading from one predictor, personal leadership behaviors (r=.660). Consequently, the first construct was labeled 'personal leadership behaviors.' Examination of the standardized coefficients reveals personal leadership behaviors as the only contributor to the function. The second construct was titled, 'general

leadership behaviors' because each leadership behavior (personal leadership practices, personal management practices, and relational leadership practices) was correlated with the construct (r = .627, .864 and .739 respectively).

Table 13 *Standardized and Pulled Within Group Coefficients*

Variable	Function I		Function II	
	Within-Group Correlation	Standardized Coefficient	Within-Group Correlation	Standardized Coefficient
Personal Leadership Behaviors	.660	.927	.627	.166
Personal Management Behaviors	-.481	-.802	.739	.477
Relational Leadership Behaviors	.192	.013	.864	.629

Table 14 presents multivariate means (group centroids) for the two functions. Multivariate analyses, rather than univariate contrasts, were employed to investigate how the three generations differed on the two discriminant functions (Enders 2003; Huberty, 1984; Huberty & Olejnik, 2006).

Table 14 *Functions at Group Centroids for the Three Groups*

Group	Function	
	I Personal Leadership Behaviors	II General Leadership Behaviors
Baby Boomers	.021	.095
Generation X	.169	-.039
Millennials	-.403	-.031

Results from the first discriminant function revealed that Generation X had the highest mean, closely followed by baby boomers and the millennial group (centroids = .169, .021 and -.403, respectively). Comparisons among the multivariate means indicated that both baby boomers and Generation X rated themselves significantly higher than millennials on personal leadership behaviors ($p = .028$, $p = .001$, respectively). There was no significant difference between baby boomers and Generation X ($p = .521$). As the MANOVA contrasts alluded, the first discriminant function revealed that baby boomers and Generation X rated themselves significantly higher on personal leadership behaviors than millennials.

Results from the second discriminant function revealed that baby boomers had the highest multivariate mean, followed by millennials and Generation X (respectively, centroids = .095, -.031, -.039). However, there was no significant difference between generational groups on general leadership behaviors. These results indicated that the second construct is not meaningful in this analysis.

5.1.2.1 Classification Analysis

The practical utility of the factor-score discriminations was evaluated through a classification analysis. This same-sample analysis used jackknifed estimates to guard against positively-biased hit rates (Huberty, Wisenbaker, & Smith, 1987; Lachenbruch, 1967). The adjusted overall hit-rate of 50.3% demonstrated that approximately half of the participants were correctly classified. According to Stevens (2002), a hit rate of over 50% characterizes a good classification analysis. However, the hit rate for baby boomers was 0%, and the hit rate for millennials was 17.1%. These low hit rates were offset by the 93.5% hit rate for Generation X. The misclassifications for both baby boomers and millennials were mainly to Generation X (96.4% and 82.1%, respectively). High misclassification rates may have been related to the disproportionate representation of Generation X in the sample. Generation X represented more than twice the number of baby boomers and millennials combined; however, unequal sample sizes would not account for all of the misclassifications. Overall, the results demonstrated that the discriminant functions were inaccurate in predicting group membership.

Chapter 6

FINDINGS

This study was designed to explore the individual and contextual factors that impact leadership behaviors. Specifically, the study investigated the behaviors of leaders working in organizations that fund, regulate, research, advocate for, and provide services and supports to people with intellectual and developmental disabilities and their families. Ultimately, the goal of the study was to determine whether and how the leadership behaviors of IDD service sector leaders differed by generation and field experience by addressing the following research questions:

1. Are there differences in IDD sector leaders' self-reported behaviors, based on the generation to which they belong?

2. Are there differences in IDD sector leaders' self-reported behaviors, based on the amount of professional experience they have in the IDD sector?

6.1 Research Question 1: Generational Differences in Leadership Behaviors

The relationship between generation and leadership behaviors was assessed to address the first research question. Leadership behaviors were characterized by three factors measured on the Leadership Institute Survey: personal leadership behaviors, personal management behaviors, and relational leadership behaviors. The investigation of generational differences introduced an area of research to human services scholarship that had previously been ignored. Common in leadership and

business literature, the exploration of generations has influenced media, pop culture, and human resources practices worldwide. However, little is known about the impact that generational differences in leadership perspectives and behaviors have had on the field of services and supports for people with intellectual and developmental disabilities, and their families.

Results from the analysis showed that generational membership had a significant effect on leaders' behaviors. In particular, millennials 'rated their personal leadership behaviors significantly lower than Generation X and baby boomers. However, the effect size and classification patterns indicated that these results should be approached with caution. Behavioral differences between generations, in this case, millennials and older generations, may not be profound. Further, the small effect size can also mean that significant differences are due to factors outside of the generational cohort. Therefore, it is worth briefly exploring the implications of the differences that were found, as well as the additional factors that may have influenced significant differences. As Cohen (1969) suggested, "a small effect of .2 is noticeably smaller than medium but not so small to be trivial" (p. 23).

6.1.1 Personal Leadership Behaviors

As the only significant factor derived from the discriminant function analysis, personal leadership behavior was the only delineating behavior between generational cohorts. Notably, millennials rated themselves significantly lower on the factor describing personal actions that benefit the leader, their team, and their organizations. These results appear to be inconsistent with previous studies. Findings from several studies of generational differences in leadership point to younger generations (recently

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millennials) as more individualistic, self-interested, and self-serving (Stein, 2013; Twenge & Campbell, 2009; Twenge & Foster, 2010).

Further, these findings contrast with results from one of the few empirical studies of generational leadership behaviors (Sessa, Kabacoff, Deal, & Brown, 2007). Sessa and colleagues (2007) also investigated leadership behaviors, using a metric that assessed similar leadership behaviors as the current study. They found that younger leaders valued individual leadership behaviors such as determination and ambition, while older generations valued relationship-based leadership behaviors such as collegiality, collaboration, and sharing responsibility. However, they concluded that the differences were more likely related to age than generational membership, suggesting that leaders may become more relationship-focused as they develop. Their findings also mirror results from other leadership publications (Oshagbemi, 2004; Twenge & Campbell, 2008). Sessa and colleagues' (2007) conclusion points to a critical limitation in the current study (discussed in depth below), the confluence of age and generation. The cross-sectional design does not allow for any distinction between age-related factors (such as experience) and generation-related factors (marked by the shared socio-historical perspective that each generation brings to the workplace).

Millennials may have rated their personal leadership behaviors significantly lower than Generation X and baby boomers because they have spent less time developing and practicing them. A more in-depth examination of the factor loadings may support these findings. Several of the variables that loaded onto the personal leadership behaviors factor related to future and change-oriented survey questions

such as: "I can describe the kind of future that I want to create;" and, "I understand the resources necessary to put change into effect."

Younger leaders may not be as confident in their ability to impact organizational change. They may not have had opportunities or experiences to develop or exhibit these leadership behaviors. Results from leadership development research also support this idea. Schneider and Schnieder (1994) found that younger or novice leaders tend to spend their time learning about their organization's guiding vision, norms, and practical impact. They spend less time setting future goals and determining change efforts.

6.1.2   Relational Leadership Behaviors

Another interesting finding from this study, there was not a significant effect for generation on relational leadership behaviors. This finding is interesting, as the focus on intergenerational relations in research and media has remained steady over the last several years (e.g., Kite, Stockdale, Whitley, & Johnson, 2005; North & Fiske, 2012; Perron, 2018; Raymer et al., 2017; Zemke et al., 2000). There have been mixed results as to whether there are behavioral differences between generational cohorts (Becton et al., 2014; Twenge & Campbell, 2008). However, studies have consistently demonstrated that generational cohorts relate differently to their work and each other (Lester et al., 2012). Additional research is needed to confirm these findings and identify the reasons for differences and similarities between generational cohorts.

6.1.3   Personal Management Practices

Additionally, generational differences did not impact personal management behaviors. Results showed that average ratings were relatively high across

generational cohorts ($M = 4.18$ out of 5). However, more research is needed to understand the reason for consistency across generations. Leadership scholars have cited the importance of behavioral and cognitive strategies, such as self-regulation, self-control, self-management and constructive thought pattern strategies on personal leadership (Carmeli, Meitar, & Weisburg, 2006; Houghton & Neck, 2002) and organizational outcomes (Blanchard, 1995; DiLiello & Houghton, 2006; Manz & Neck, 1999; Manz & Sims, 2001). However, no research was found connecting personal management behaviors and generational differences. Future studies should examine this relationship to assess whether these findings are consistent for different populations in different contexts.

6.1.4   Effect Size and Classification

Ultimately, the discussion of these findings must consider the small effect size and the unstable classification results, particularly the low hit rate for baby boomers and millennials. Researchers have noted that many published articles omit the discussion of effect size, focusing solely on the p-value (Kline, 2004; Sullivan & Feinn, 2012). They have also argued that the effect size warrants equal attention, as it describes the magnitude of the difference between groups (Cohen, 1990; Mendoza et al., 1978; Stevens, 2002). In this study, the small effect size indicates that differences between generations may not be substantial, or may be attributed to other factors. The results of the classification analysis supported this notion, as the low hit rates for baby boomers and millennials indicated that the discriminant function was unable to classify cases to their a priori groups correctly. Although the factor, personal leadership behaviors, was significant, it did not adequately distinguish the generational groups.

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Results from a comprehensive meta-analysis of more than 300 studies demonstrated that a small effect size is an issue common to generational research (Costanza et al., 2012). Costanza and colleagues (2012) found that most publications did not include effect size in their findings. However, of those that did, almost all resulted in a small or very small effect size (Costanza et al., 2012).

Conversely, there are some examples of studies that did include discussions about the implications of small effect sizes (e.g., Becton et al., 2014; Giancola, 2006; Kowske, Rasch, & Wiley, 2010). For instance, Becton and colleagues (2014) reported a small effect size in their study of generational differences in leadership behaviors. They concluded that researchers and practitioners should consider the possibility that generational cohorts are not as different as many believe. They argued that organizational leaders should refrain from implementing generation-specific interventions and strategies without first exploring alternate solutions. Their discussion resonated with previous assessments that have criticized media and business strategists for overestimating the impact that generational differences have on organizational culture and practice (Costanza et al., 2012; Giancola, 2006; Rudolph & Zacher, 2017). Similarly, the small effect size and limited scope of this project should caution readers to limit their interpretation of these findings.

6.2 Research Question 2: Differences in Leadership Behaviors by Amount of Field Related Experience

The influence of field-related experience in the IDD service sector on leadership behaviors was considered as an alternative approach to the focus on generational differences. This analysis addressed the second research question and was included in the research design to ground the study in the socio-historical context of

the IDD services sector. While the analysis of generational differences mirrored previous research designs in general business and leadership literature, this approach considered the impact that field-specific leadership experience has on leadership behaviors. Socio-historical events marking political and social turning points in the IDD service sector were selected to define sample groupings.

Results from the analysis indicated that there was not a significant effect for experience in the field on leadership behaviors. Because the survey did not ask respondents to describe how their experience in the changing IDD service sector impacted their leadership practices, the reason for the lack of significance is not known. Possible solutions are discussed below.

6.2.1 Lack of Investment in Leadership Development in the IDD Services Sector

One unlikely reason that experience did not significantly impact scores of self-related leadership behaviors is that the leadership behaviors of participating IDD service sector professionals did not develop as their experience in the field progressed. Many studies have demonstrated the significant impact that intentional leadership development opportunities have on acquisition and enhancement of effective leadership practices (Ericsson & Charness, 1994; Mumford et al., 2000). As it has been discussed several times throughout this study, leadership development has not been a primary focus in the nonprofit sector (Landles-Cobb et al., 2015; Larcker & Miles, 2010). The IDD service sector, in particular, lacks formal and informal development opportunities for leaders to strengthen their leadership knowledge, skills, and behaviors (Bigby & Beadle-Brown, 2018; Foster-Fishman et al., 2007; Thompson-Brady et al., 2009). Moreover, field experts have described the lack of investment in the next generation of IDD service sector leaders, including little

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investment training and development opportunities and little or no succession planning, as threats to the quality of future services and supports for people with disabilities and their families (Foster-Fishman et al., 2007; Thompson-Brady et al., 2009).

However, there is compelling evidence that leadership growth is not solely dependent on leadership training and development programs. Researchers have found that professional experience alone does stimulate the development and acquisition of leadership skills and behaviors (Ackerman, 1989; Ackerman, 1991; Anderson, 1993; Sternberg, Wagner, & Williams, 1995). Findings from previous studies have shown that field related experience impacts the development and demonstration of generic and field-specific leadership behaviors such as communication skills, creative thinking, and specialized problem solving (Mumford et al., 2000).

Due to the cross-sectional design of this study, it is not possible to assess the development of leaders or make assumptions about their growth over time. However, the literature outlined above shows that it is highly unlikely that the results of this analysis were insignificant because leadership behaviors did not develop as leaders gained experience in the IDD service sector. Future studies should explore how the lack of investment in leadership development across the IDD service sector relates to the rate of acquisition and growth of leadership behaviors over time.

6.2.2 Sample Characteristics

The characteristics of the sample likely impacted the results of this study. Survey respondents were selected to participate in a leadership development opportunity because they were identified as current or potential leaders in their organizations. Further, most participants held traditional leadership positions in their

organizations, regardless of their experience in the field. These sample characteristics suggest that respondents have had the opportunity to practice personal and relational leadership behaviors before attending the Leadership Institute.

Further, lack of investment in IDD service sector leaders does not mean there is no access to any leadership development opportunities, training, and resources. Harvey and Buckley (2002) argued that a paradigm shift in leadership was, in part, brought on by increased access to information and research about successful leadership skills and behaviors. Moreover, results from the Leadership Institute Follow Up Survey show that, on average, Leadership Institute attendees have participated in three additional leadership development programs in their careers (ranging from 0 to 17). People who participate in the Leadership Institutes may have more leadership savvy than the general population of IDD service sector professionals. Future researchers could compare differences among self-rated leadership behaviors, considering prior investment in leadership development programs.

6.2.3   General Leadership Behaviors

The behavioral leadership factors investigated in this study, personal leadership behaviors, personal management behaviors, and relational leadership behaviors, reflected general leadership practices. The study was not designed to measure leadership practices specific to the development, regulation, and delivery of services and supports for people with intellectual and developmental disabilities and their families. Potentially, the investigation of leadership behaviors, specific to the changing expectations of IDD service sector leaders, would have yielded more significant results. This supposition is supported by Martin and colleagues (2012), as

findings from their study determined that behaviors characterizing effective leadership strategies varied by the contexts in which they were applied.

The chosen research design was not unprecedented, however. The literature review in Chapter 2 discussed empirical studies have previously explored generic leadership perspectives and practices within the specific contexts of service industries (Mumford et al., 2000; Yu & Miller, 2005), countries (Chu & Choi, 2010; Wang et al., 2011) and history (Harvey & Buckley, 2002).

6.3 Limitations

There are several notable limitations to the current study that may have had a meaningful impact on the results of this study. In general, the design of the study and the restricted sample limit the interpretability of the findings.

6.3.1 Sample Bias

Sampling bias occurred due to imperfect sampling frames (Lavrakas, 2008). Recruitment for the National Leadership Consortium's Leadership Institutes and, subsequently, the longitudinal study employs convenience sampling. All participants self-select into the program and study.

Further, results from this study cannot be attributed to the general population of IDD sector leaders; leaders who participate in the Leadership Institutes may not reflect the skills and behaviors of the IDD services sector broadly. For example, respondents may represent a more skilled or experienced subset of IDD service sector professionals. Most respondents (69.1%) worked in positions traditionally characterized as leadership positions. This rate indicates that most participating leaders

have had opportunities to develop and practice effective leadership behaviors in their roles, regardless of generational membership and field experience.

Leaders also attend a Leadership Institute understanding the focus on changing services and systems to reflect principles of self-determination and civil rights for people with IDD and their families. Leaders aim to develop and enhance leadership knowledge, skills, and practices useful for service transformation. Therefore, participants may represent a group that is more or differently committed to inclusion for people with IDD and systems transformation than the full IDD services sector.

6.3.2   Secondary Data Analysis

The use of secondary data in research is growing as access to online data libraries continues to expand (Cheng & Phillips, 2014; Windle, 2010) There are several benefits to a secondary data analysis approach. Analyzing secondary data maximizes the use of previously collected data, reducing the repetition of research and resource wasting. Further, secondary data provides researchers who have limited resources to employ sufficient sampling and data collection techniques with access to large and representative data sets (Tripathy, 2013).

However, there are also limitations associated with the use of secondary data. For instance, data is often collected to answer a specific research question or address a specific research topic; this can limit the validity of the results of secondary data analyses (Szabo & Strang, 1997). This issue is relevant to the current study as the Leadership Institute Survey was designed to measure the impact of the Leadership Institute on participating leaders' skills, knowledge, and behaviors. The study was not designed to answer the specific research questions about generational cohorts and field experience. Participants were not asked to consider the influence that generational

membership or experience in the field had on their self-ratings of leadership behaviors. Future studies are needed to ask leaders to explicitly consider the personal and contextual factors that influence their leadership practices.

The limitations related to the secondary data analysis are further exacerbated by the design of the Leadership Institute Survey. Because the survey was developed by incorporating excerpts from published questionnaires, rather than full metrics, the survey is not entirely measuring the constructs intended in the original development of each tool. The results of the exploratory factor analysis demonstrated this limitation as the variables that loaded onto each factor did not perfectly align with the original tools selected. Further, variables from only two of the four tools were used in the MANOVA and discriminant function analyses as they loaded onto factors that met acceptable criteria for internal consistency.

6.3.3 Confluence of Age and Generation

Perhaps the most significant limitation of this study was related to the cross-sectional design. In each analysis, the variable of interest (generation) was confounded with age. According to Glenn (2005), in single time point designs, chronological age and birth year cohort are the same. Therefore, it is impossible to parse out which effects were due to age-related characteristics or experiences and which were related to the shared experience of generational cohorts (Rudolph et al., 2018). Future studies should employ a cross-temporal approach to understand the differences in leadership behaviors that are genuinely attributable to generational membership (Costanza et al., 2012).

6.3.4 Cultural Limitations to Generations

The current study adopted generational boundaries that are commonly cited by the federal government and national research centers. Typically, those boundaries have been defined to represent collective experiences and characteristics; they do not account for cultural differences. The conceptualization of collective experiences does not typically consider experiential differences related to gender, race, ethnicity, nationality, sexuality, socioeconomic status, or religion. In general, the experiences and characteristics that define generational cohorts are biased to the cultural experiences and opportunities of white, nondisabled, middle-class Americans (Chu & Choi, 2010).

This limitation is central to Elder and colleagues' (2003) criticism of generational research. He argued that "members of a birth cohort are not uniformly exposed to change, suggesting that cohort subgroups should be identified in terms of similar exposure" (p. 9). Limited research has also exemplified this issue (e.g., Chu & Choi, 2010). Chu and Choi (2010) found that the application of traditional generational boundaries was not culturally or contextually relevant to diverse samples.

6.3.5 Accuracy of Self Rated Data

The results from this study were analyzed using self-ratings of leadership behaviors. However, as previous studies have demonstrated, the accuracy of self-ratings is often suspect (Becker & Colquitt, 1992). Survey participants do not always select responses that accurately depict their behaviors. Researchers who have examined the reasons for discrepancies between self-reported behaviors and de facto behaviors have offered the following explanations:

1. Social desirability response bias: study findings have demonstrated that people tend to rate themselves higher on factors that they deem

'socially desirable' (Johnson & Fendrich, 2002; King & Bruner, 2000; van de Mortel, 2008). As it relates to the current study, social desirability response bias suggests that Leadership Institute participants may have rated their leadership behaviors higher before the Leadership Institute so that they appear to be effective leaders as they prepare to attend a national training;

2. Confusing intention with behavior: researchers have also found that people may rate themselves higher on factors that describe skills, behaviors, or attributes that align with perceived leadership identity, whether or not they reflect reality (Phillips & Lord, 1986). Leaders who participated in this study may have rated their leadership behaviors higher because the practices identified align with how they perceive themselves as a leader. They may have confused intention with behavior; and,

3. Unverifiable responses: finally, researchers have demonstrated that the accuracy of self-reporting tends to decrease when the items measured are not verifiable (Becker & Colquitt, 1992; Schrader & Osburn, 1977; Shaffer, Saunders, & Owens, 1986). The National Leadership Consortium does not verify participant responses, limiting confidence in the validity of the data.

Several of the limitations listed above affect the applicability of findings to leaders outside of the study sample. However, this project was designed to introduce the topic of generational leadership in the context of the intellectual and developmental disabilities service sector. As such, the primary offering of the study is related to the theoretical and methodological design that grounds the exploration of leadership behaviors in the socio-historical context of the IDD services sector.

In particular, this project offers replicable methodological approaches. For instance, future studies should consider theoretical approaches, such as the life course framework and behavioral approach, as they both consider the developmental nature of humans and leadership. Similarly, the selection of variables and analyses in the current project can inform the design of future studies. More research is needed to understand if and how generic leadership behaviors apply in the unique context of the

IDD services sector. Chapter Seven includes an in-depth discussion of the findings and their application to future research, theory, and practice.

Chapter 7

DISCUSSION

After an extensive review of the literature, no other study was found that investigated the relationship between the behaviors of IDD service sector leaders and generations and experience in the field. This study is also one of the first to quantitatively assess the leadership practices of IDD service sector leaders. Previous studies found were qualitative, designed to describe leadership traits and behaviors in the context of services and supports for people with intellectual and developmental disabilities and their families (Bigby & Beadle-Brown, 2016; Bigby & Beadle Brown, 2018). As such, the findings from this study offer field, theory, research, and practice implications.

7.1 Application of Findings to the IDD Service Sector

The initial justification for this study outlined three contextual factors currently impacting the IDD service sector. These contextual factors made the exploration of generational differences in leadership behaviors pertinent to the discussion of quality services and supports for people with intellectual and developmental disabilities and their families. As such, the changing service sector, lack of investment in leadership and leadership development, and direct support workforce shortage were reviewed. The discussion below describes the results of this study as they inform each of those contextual factors.

7.1.1   The Changing Service Sector

The skills and behaviors needed to lead effectively have changed as services and supports for people with IDD and their families have shifted over time. However, leadership is a topic that was absent from IDD service sector research until the last decade. Therefore, little is known about the skills and practices of leaders working in agencies that fund, regulate, and provide services and supports to people with intellectual and developmental disabilities and their families.

Moreover, less is known about the individual and contextual factors that have impacted leaders' behaviors over time. Lack of knowledge means that there is almost no empirical information about the leadership practices that have contributed to the successful changes towards individualized, person-directed services, and supports for people with IDD and their families. Nor is there information about the factors that influenced those practices.

Findings from this study offer limited insight into the individual and contextual factors that have influenced leadership behaviors over time. However, they do point to the need for additional research that tests common assumptions about generational differences in the workplace. More research could inform organizational recruitment and development practices. For instance, factors such as alignment of personal beliefs with principles of self-direction may more meaningfully predict successful leadership strategies.

Further, as was discussed in Chapter Six, the lack of definitive findings yielded from this study may have also been related to the generic nature of the leadership behaviors explored. Results of this study point to the need for future research that identifies the leadership behaviors that directly contribute to the design, development, and implementation of services and supports that are responsive to the needs of people

with IDD and their families. Instead of generic leadership behaviors, future research projects could consider field-specific frameworks that identify effective practices that enhance quality services.

For example, as services and supports have evolved to become more responsive to people with IDD and their families, resources and training materials have been developed to help people with IDD, families, and IDD service sector professionals understand what these changes mean to their role. For instance, the person-centered services model offers strategies and practical tools that professionals can implement to ensure that the wants and needs of people with IDD and their families are central to service design and delivery (Couser, 1997; Smull, Bourne, & Sanderson, 2010). More recently, the LifeCourse framework was developed to offer strategies and tools to help professionals design and implement services that are responsive to a person in each stage of their life, and in the context of their family systems (Reynolds, St John, & Gotto, 2012). Perhaps, future studies could use these frameworks to identify aligned leadership behaviors.

7.1.2 Investment in IDD Service Sector Leaders

The results from this study did not identify concrete training and development needs of IDD service sector leaders, based on generation or amount of professional field experience. However, the literature review did indicate that investment in leadership across the IDD service sector continues to be an unmet priority for current and emerging leaders.

To a large extent, the acquisition of skills and behaviors that prepare leaders to develop and continue to transform services and systems that are responsive to people with disabilities and their families has been left to chance. Field experts have

speculated that this lack of investment has resulted in fragmented changes in services and supports for people with intellectual and developmental disabilities and their families (Thompson-Brady et al., 2009).

Because generation and field experience did not have definitive effects on leadership behaviors, more research is needed to determine whether an investment in leadership development should be differentiated based on generational membership and the amount of professional field experience. Similarly, future researchers should investigate the utility of succession planning and promotion strategies based on generational membership and amount of professional field experience. These recommendations echo those from business scholars who suggest that many factors, beyond experience, should be considered in the recruitment of leaders. They have suggested that skills, alignment of organizational and personal vision, interpersonal styles, and commitment to the organization may be more important than generational membership (Redfern, 2016).

7.1.3 Direct Support Workforce

The findings from this study also highlight the need for more research that connects leadership behaviors with workforce stability. Although the findings were not significant, this study did explore leadership behaviors salient to workforce issues. In particular, relational leadership behaviors have been shown to positively impact the culture of a workplace environment (Bigby & Beadle Brown, 2016; Foster-Fishman et al., 2007) as well as the quality of services offered to people with disabilities (Bigby & Beadle Brown, 2014; 2016; 2018) and their families (Reynolds et al., 2018). More research is needed to understand how and whether current and future IDD sector leaders have relational leadership skills. This research could impact the design and

content of training, technical assistance, and support offered to ensure that leaders have the skills and capacity needed to influence the workforce positively.

Specifically, future studies should further explore the impact of generation and experience on the development of relationship-based leadership behaviors. Strategies and tools used to develop relational leadership behaviors may be useful across organizations, regardless of generational membership and professional experience in the field. However, additional research is needed to determine the replicability of the study findings in the broader IDD service sector.

7.2   Theory Implications

As discussed in the previous chapter, one of the primary contributions of this study to human service, leadership, and generational literature is the application of theory in the study design, analysis, and interpretation of findings. Ultimately, the importance and relevance of each theoretical framework were supported by the results of this study. Further, the findings from this study identified potential gaps in each theory and informed future applications in research.

7.2.1   Life Course Theory

The use of life course theory benefitted the current study and leadership literature as a whole. As was stated previously, leadership publications are too often devoid of theory, limiting the design of many studies (Avolio, 2007; Covelli & Mason, 2017; Inceoglu et al., 2018). The application of theory, in general, provides a framework for future research. Further, findings from this study also accomplished the recommendations of previous researchers who have called for the increased use of ontogenetic theory (including life span and life course) in leadership literature (Avolio

et al., 2009; Rudolph & Zacher, 2017). Again, this study provides a model that can inform the design of future studies of leadership attempting to incorporate life course theory.

The study findings also affirmed a central premise of life course theory: development is complex and multifaceted. Understanding how a person acquires and develops specific leadership skills or behaviors requires the consideration of any number of personal and contextual factors (Oc, 2018). This study attempted to employ a context-specific approach by selecting variables of interest and sample boundaries that were informed by the principles and assumptions of the life course theory. Two types of temporal influences, generation, and experience in the IDD services sector, were considered, and the sample was selected by narrowing the field and number of years from which data were collected.

Although the analyses did not yield meaningful differences in leadership behaviors, these findings do not suggest that the life course theory was any less meaningful of a theoretical perspective for the current study. Conversely, the life course theory is useful in the interpretation of the results. The life course theory assumes that contextual and temporal factors influence development; however, it does not assume that all contextual and temporal factors influence development equally. The findings may suggest that the contextual factors considered were not the most influential in differentiating self-reported leadership behaviors. However, understanding which factors may not influence behavior is also important and relevant to the application of life course theory.

Finally, the findings from this study may also challenge Elder and colleagues' (2003) criticism of the study of generations. In particular, the conceptualization of

generations used for this study directly aligns with central determinants of life course theory. For example, Elder and colleagues (2003) describe social pathways as patterns that members of society follow:

> These pathways are shaped by historical forces and are often structured by social institutions. Individuals generally work out their own life course and trajectories in relation to the institutionalized pathways and normative patterns. (p. 8)

Elder and colleagues' (2003) description of *social pathways* parallel the definition of generations as shared social and historical perspectives that influence development and behavior (Eyerman & Turner, 1998). Future studies should consider the application of life course theory in generational research as it was a useful framework to guide the design and interpretation of results for the current study.

7.2.2   Behavioral Leadership Approach

Findings from this study also demonstrated the importance and utility of the behavioral approach to leadership. The results did not yield conclusive and meaningful differences in leadership behaviors based on generational membership and the amount of professional field experience. Therefore, they highlighted the need to better differentiate behavior from perception in generational, leadership, and human services literature.

For instance, as Becton and colleagues (2014) pointed out, there is limited knowledge about generational differences and similarities in leadership behaviors and practices. Although previous studies of generations and leadership have produced significant findings related to differences in personality and traits (Twenge, 2010), workplace expectations (Lancaster & Stillman, 2005) and organizational commitment

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(D'Amato & Herzfeldt, 2008; Davis, Pawlowski, & Houston, 2006), little is known, empirically, about the translation of those differences into practice (Deal, Altman, & Rogelberg, 2010). The behavioral approach offered a lens through which to explore this under-researched aspect of leadership and generations.

Further, the behavioral approach is particularly relevant in the IDD services sector as very little is known about the behaviors of leaders working in agencies that fund, regulate, research, advocate for and provide services and supports to people with intellectual disabilities and their families. Understanding the leadership behaviors that current leaders demonstrate is a critical first step to making empirical connections between leadership practices and the quality of services and supports. Findings from this study affirmed this need, as they began to describe the practices that IDD service sector leaders have demonstrated.

At the same time, findings from this study provided evidence aligning with a common critique of the behavioral approach, its contextual utility (Martin et al., 2012; Northouse, 2019). Early behavioral leadership scholars attempted to identify leadership practices that are universally effective, regardless of the context in which they are demonstrated (Northouse, 2019). Although these universal behaviors have yet to be validated, several metrics of individual and relational leadership behaviors have been developed and applied across industries and sectors. These behaviors have been investigated without specific consideration of their contextual application (Blake & Mouton, 1964; Hemphill, 1949; Hemphill & Coons, 1957; Katz & Khan, 1951).

While these commonly measured leadership behaviors may characterize effective leadership strategies (Kaplan & Kaiser, 2003), there is a need to understand how they are applied in different workplace environments (Bryman, 1992; Yuki,

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2003). For instance, to enhance the practical application of findings from this study, future studies should empirically assess how leadership behaviors that are commonly characterized as effective impact the structure, practices, and quality of IDD service sector organizations. Specifically, studies should be designed to investigate leadership practices that are uniquely important to the successful development and implementation of quality services and supports for people with disabilities and their families.

7.3 Research Implications

Results from this project contribute to the conflicted body of research that has yet to agree upon the impact that generational membership has on leadership behaviors (Becton et al., 2014; Sessa et al., 2007). The design of the study offers strategies by which generational and other contextual factors can be considered. At the same time, more research is needed to determine the interacting personal and contextual variables that impact leadership practices in agencies that serve people with IDD and their families.

7.3.1 Methodological Recommendations for the Study of Generations and Leadership

By exploring the impact of generations and field experience (based on significant socio-historical events in the IDD services sector), this study provided a more contextually rigorous approach than many previous studies of generational leadership. However, the results indicated that more, methodologically sound research is needed to draw definitive conclusions about the nature of behavioral leadership

differences across multiple generations. Future studies should consider the following recommendations:

- Make a clear connection between theory and methodology, assuring that the variables measured and analyses employed are grounded in the theoretical perspective of the study (Costanza et al., 2017);

- Employ cross-temporal design to parse out the impact of generation and co-occurring temporal factors such as age, era in which people are working, professional experience, and leadership position (Costanza et al., 2012; Costanza et al., 2017; Macky, Gardner & Forsyth, 2008; Rhodes 1983; Trzesniewski and Donnellan 2010);

- Test generational differences that were previously found to be significant in new or specific contexts such as industry, culture, and geography (Chu & Choi, 2010; Costanza et al., 2017; Yu & Miller, 2005);

- Consider effect size as well as p values (Cohen, 1969; Sullivan & Feinn, 2012); and,

- Explore other factors that influence differences in leadership behaviors over time (Rudolph & Zacher, 2017).

These recommendations are particularly relevant to research related to services and supports for people with IDD and their families. Because little is known about the leadership behaviors of IDD service sector professionals, researchers should adopt methodologically sound practices to ensure the validity of their findings.

Further, the study of generations, as a whole, may benefit from a different approach altogether. A barrier to the interpretation of project results was the lack of information or insight from participating leaders about the impact they felt generational membership and field experience had on their leadership behaviors. Findings from the literature review show that this missing element is not unique to the current study. No studies were found asking leaders (in any sector or context) to

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reflect on the influence that generational membership has had on their leadership perspectives, values, and behaviors.

However, one study did ask respondents from multiple generational cohorts to consider how their values and preferences differed from those of other generational cohorts (Lester et al., 2012). Lester and colleagues (2012) found that each generational cohort perceived substantially more differences than were demonstrated in practice. These results support the above suggestion, signifying that there are commonly accepted stereotypes about each generation that may not be directly attributable to generational membership. More information is needed to distinguish the shared experiences and socio-historical contexts that do, in fact, influence generational perspectives, traits, and behaviors. Reflective interviews or surveys with members of each generation may provide insight.

7.3.2 Research Focused on IDD Service Sector Leadership

Another focus of this study was to introduce research that specifically focused on leadership in the IDD services sector. While the study offered replicable methodological strategies, the findings did not provide definitive conclusions about leadership behaviors. There is a need for more empirical research focusing on the personal and contextual factors that influence IDD service sector leaders' behavior and practices. Future researchers can use similar methods to explore generational and experiential differences with a broader population of leaders within the IDD services sector.

Moreover, researchers should begin to investigate unexplored organizational factors that may influence leadership behaviors, such as the type and traditional nature of the organization for which they work. Furthermore, future research should make

more explicit connections between leadership practices and service quality. Studies, such as Bigby and Beadle-Brown's (2016) investigation of manager and leader traits and behaviors that are unique to high-quality service settings are useful as they can be used to guide future research development and design.

7.3.3   Lessons from the Early Childhood Field

Future researchers should also look outside the IDD service sector as other Human Service industries have demonstrated how connecting leadership practices to quality services can be accomplished. For example, in the early childhood education (ECE) literature, there has been a growth in empirical research focused on leadership in ECE programs. Studies have examined leadership roles (Rodd, 1997), job-specific competencies (Bloom, 2000), and the impact of experience on program environment and outcomes (Kontos & Fine, 1989). Research from this sector has found that strong ECE program leadership correlates with child development (Siraj-Blatchford & Manni, 2006), better child-teacher relationships (Stipek & Ogana, 2000), and positive organizational climate (Teddlie & Reynolds, 2000). Researchers have also found that strong leadership leads to lower staff turnover (Hayden, 1997) and higher job satisfaction (Bloom, 1997).

These findings have influenced the investment in ECE leadership development worldwide, demonstrating the impact that leadership focused research can have in the human service industry (Siraj-Blatchford & Manni, 2006). Furthermore, the studies cited above offer examples of replicable research questions and study designs that may serve as useful examples for IDD service sector research. For instance, early childhood researchers have collected data from ECE leaders about the sector-specific skills and behaviors that lead to better child outcomes (Siraj-Blatchford & Manni,

2006). A similar study in the IDD services sector would supplement findings from the current study, providing detailed information about the leadership behaviors that are most important to focus on to assure that people with intellectual and developmental disabilities and their families have access to quality services and supports.

7.4   Practice Implications

In their discussion of generational research findings, Becton and colleagues (2014) raised a question pertinent to this study. If there is inconsistent evidence of generational differences in leadership behaviors, characteristics, and motivations, why are generational stereotypes prevalent in workplace culture, training, and Human Resource strategies? Findings from this study point to the need for more research to develop concrete practice recommendations.

One reason that the topic of generations prevails in the workplace is that people feel they exist. Lester and colleagues (2012) found that professionals from the millennial generation, Generation X, and baby boom generation perceived more than three times as many generational differences in the workplace than existed. Rudolph and Zacher's (2017) argument that perceptions of generational differences become a self-fulfilling prophecy in workplace culture and relations may be accurate.

The results of this project may align with previous studies that have not found significant or substantial differences across generational leadership behaviors (e.g., Becton et al., 2014; Costanza et al., 2012). These findings should caution organizational leaders and Human Resource professionals who are eager to address generational differences. Until there is definitive empirical evidence, practitioners should reconsider generation-specific strategies and practices that may not yield benefits commensurate with their costs (Becton et al., 2014; D'Amato & Herzfeldt,

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2008; Kowske et al., 2010). Instead, empirically supported successful strategies may include implementing practices and processes that are beneficial to all employees. These strategies include workplace flexibility (Allen, 2001; Richman, Civian, Hill, & Brennan, 2008) and investment in talent, career, and leadership development (Landles-Cobb et al., 2015; Tebbe et al., 2017). However, due to substantial limitations in the project, findings from this study primarily compel more research to distinguish perceptions about generational differences from generation-inspired behavioral differences.

7.5   Conclusion

The conclusions of this study will mirror those of several prior studies of generations and leadership. First, more research is needed to understand the impact of generations and field experience on leadership behaviors. The lack of substantial and significant results suggest that the behaviors of IDD service sector leaders may not differ because of generational membership or field experience. However, due to the limitations of the sample and study, these findings cannot be generalized to the general population of IDD sector leaders.

Second, until there are more definitive research findings regarding the impact of generational membership and field experience on leadership behaviors, practitioners should carefully consider targeted interventions. As previous scholars have warned, the amount of attention paid to generational differences in the media, pop culture, organizational consultation, training, and Human Resources practices has likely been blown out of proportion (Costanza et al., 2012). There is not enough methodologically sound empirical evidence to substantiate the focus.

Given the attention that has been paid to generations, as well as the research showing that generations feel that they behave differently at work (Lester et al., 2012), I still agree with Arsenault (2004) that it is an important topic to study. However, future research should employ more sound methodology. Future research should also be reflective; respondents should be asked to consider how their generational identity has influenced their leadership behaviors. Further, research should continue to consider the influence that context, such as industry, geography, and culture, has on leadership behaviors. Finally, future research should also consider the co-occurring temporal factors that might influence the behaviors of leaders, such as leadership position, field experience, age, and era in which leaders are working. This study offers several examples of techniques that future studies can employ.

Ultimately, this study was designed to enhance the focus on leadership specific research in the Intellectual and Developmental Disabilities Services sector. Ideally, this study will inspire the continued exploration of factors that impact the perspectives, skills, and behaviors of IDD service sector leaders. More information about IDD service sector leaders will help researchers, policymakers, trainers, and practitioners continue to identify meaningful leadership practices that enhance the quality of supports available to people with disabilities and their families. This information can ultimately inform how IDD service sector leaders are selected, developed, trained, and mentored.

As people with intellectual and developmental disabilities and their families continue to demand services and supports that are increasingly individualized and assure choice control and community inclusion, the role of IDD service sector leaders continues to evolve. Current and emerging leaders must acquire the skills, resources,

and behaviors needed to design, develop, transform, regulate, provide, and manage responsive services and systems of support. Research can contribute to systems progress by exploring and identifying the leadership skills and behaviors that facilitate services that are designed to recognize and respect the human and civil rights of people with intellectual and developmental disabilities and their families.

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Appendix A

LEADERSHIP INSTITUTE SURVEY AND CODES

Table A.1, below, outlines all questions, codes and response options from the Leadership Institute Survey, including the questions that were and were not used in the current study.

Table A.1 *Leadership Institute Survey*

Revised Self Leadership Questionnaire						
Questions Considered for this Analysis	Code	Response Options				
I establish specific goals for my own performance.	EstablishGoals	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I consciously have goals in mind for my work efforts.	ConsciousGoals	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All

Table A.1 *Continued*

I make a point to keep track of how well I'm doing at work	TrackWork	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I use written notes to remind myself of what I need to accomplish	WrittenNotes	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I work towards specific goals I have set for myself	WorktoGoals	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I usually am aware of how well I'm doing as I perform an activity	AwarePerformance	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I think about the goals that I intend to achieve in the future	FutureGoals	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I pay attention to how well I am doing in my work	PayAttention	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I write specific goals for my own performance	WriteGoals	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I use concrete reminders (e.g. notes and lists) to help me focus on things I need to accomplish	ConcreteReminders	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I keep track of my progress on projects I'm working on	TrackProgress	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All

Table A.1 *Continued*

Role Efficacy Scale

Questions Considered for this Analysis	Code	Response Options		
Choose the response that best applies to you in your role	RoleImportant	My role is very important in my organization; I feel central there.	I am doing useful and fairly important work.	Very little importance is given to my role in my organization; I feel peripheral there.
Choose the response that best applies to you in your role	RoutineWork	I am doing usual, routine work in my role.	In my role I am able to use my creativity and do something new.	I have no time for creative work in my role.
Choose the response that best applies to you in your role	ContSociety	I regret that I do not have the opportunity to contribute to society in my role.	What I am doing in my role is likely to help other organizations or society.	I have the opportunity to have some effect on the larger society in my role.
Choose the response that best applies to you in your role	ContDecision	I contribute to some decisions.	I have no power there.	My advice is accepted by my seniors.
Choose the response that best applies to you in your role	ContLearning	Some of what I do contributes to my learning.	I am slowly forgetting all that I learned (my professional knowledge).	I have tremendous opportunities for professional growth in my role

Table A.1 *Continued*

Choose the response that best applies to you in your role	Schedule	I do a good job according to a schedule already decided.	I am able to be innovative in my role.	I have no opportunity to be innovative and do something creative.
Choose the response that best applies to you in your role	CentralOrg	I feel quite central in my organization.	I think I am doing fairly important work.	I feel I am peripheral in this organization.
Choose the response that best applies to you in your role	ContOrg	I am able to contribute to my organization in my role.	I am able to serve the larger parts of society in my role.	I wish I could do some useful work in my role.
Choose the response that best applies to you in your role	InfluenceDec	I am able to influence relevant decisions.	I am sometimes consulted on important matters.	I cannot make any independent decisions.
Choose the response that best applies to you in your role	Learn	I learn a great deal in my role.	I learn a few new things in my role.	I am involved in routine or unrelated activities and have learned nothing in my role.
On a scale of 1 to 10, please rate your personal leadership effectiveness in the organization for which you work	RateLeadership	Rate 1 to 10		

Table A.1 *Continued*

Leadership Dimensions Survey

Questions Considered for this Analysis	Code	Response Options				
I can describe the kind of future that I would like to create for my organization.	DescribeOrgFuture	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
My behavior is congruent with my leadership philosophy.	LeadBehaviorAlign	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I am aware of new developments in this field.	AwareFieldDevel	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I am consistently an ethical and upstanding leader.	ConsistentlyEthical	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I have difficulty giving clear, specific outcomes that would result from change.	ClearOutcomes	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I support projects and changes, both publicly and privately.	SupportProjects	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I practice principles of self-accountability.	SelfAccountable	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All

Table A.1 *Continued*

I appeal to others to join in the vision of the future.	AppealFutureVis	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I consistently practice what I preach.	PracticePreach	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I seek out challenging opportunities that test and stretch the organization's skills and abilities.	SeekChallenge	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I encourage team members to be interdependent and empower team members.	EmpowerTeam	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I have clear and specific reasons for initiating change in my organization.	ChangeClarity	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I monitor projects and change activities with clear goals, plans, and established milestones.	MonitorProjects	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I am consistently well prepared for any project or change effort contingency.	WellPrepared	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I am sincere when asking for others' suggestions and opinions.	Sincere	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I can clearly communicate a hopeful and inspiring outlook for the future of my organization.	ClearCommunicate	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All

Table A.1 *Continued*

I reinforce and/or reward the efforts of those who carry out projects and change efforts.	RewardEfforts	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
Typically, I can provide team members with a thorough understanding of any project or change effort.	TeamUnderstand	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I create an atmosphere of mutual trust during projects and change efforts.	CreateTrust	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I understand the resources necessary to put change into effect.	ChangeResource	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I experiment at work and take risks with new approaches, regardless of the chance of failure.	TakeRisk	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I am capable and effective in both technical and leadership abilities.	TechnicalLeadership	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I make a concerted effort to tell the organization about the good work done by the team.	ShareGoodWork	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I show others how their interests can be realized by joining a common vision.	JoinCommonVision	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I make personal sacrifices in order to complete projects or to further change efforts.	PersonalSacrifice	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All

Table A.1 *Continued*

I understand how all the interacting parts of our organization come together.	UnderstandInteract	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I can always be believed about what I am saying.	Believable	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I have difficulty understanding the scope of proposed changes and the impact of change on people and the organization.	UnderstandImpact	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I practice innovative leadership that fosters a sense of ownership in others.	InnovativeLeaders	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
I challenge the status quo regarding the way things are done.	ChallengeStatQuo	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
Typically, I establish open, trusting work relationships.	TrustingRelationship	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All

Table A.1 *Continued*

Community Living Attitudes Scale

Questions Considered for this Analysis	Code	Response Options				
Professionals should not make decisions for people with IDD unless absolutely necessary.	DecisionsDD	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
People with IDD are happier when they live and work with others like them*	GroupDD	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
Without some control and supervision, people with IDD could get in real trouble out in the community*	ControlDD	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
The rights of people with IDD are more important than professional concerns about their problems.	RightsDD	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
People with IDD usually should be in group homes or other facilities where they can have the help and support of staff*	ShelteredDD	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
Agencies that serve people with IDD should have them on their boards.	BoardDD	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
People with IDD should be encouraged to lobby legislators.	LobbyDD	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All
The opinion of a person with IDD should carry more weight than those of family members and professionals in decisions affecting that person.	OpinionWeightDD	Completely Accurate	Mostly Accurate	A Little Accurate	Somewhat Accurate	Not Accurate at All

Table A.1 *Continued*

Survey Questions Not Considered for this Analysis

Questions Considered for this Analysis	Code	Response Options				
Please indicate the degree that you feel informed about new developments in the leadership field	DevelLeadership	I am as informed as I can ever be	I feel very informed	I feel somewhat informed	I feel slightly informed	I am not informed
Please indicate the degree that you feel informed about new developments in the disabilities field	DevelDisabilities	I am as informed as I can ever be	I feel very informed	I feel somewhat informed	I feel slightly informed	I am not informed
How would you define the word traditional (vs. progressive)- related to services and supports for people with IDD	DefineTraditional	Open Ended				
How would you define the word progressive (vs. traditional) related to services and supports for people with IDD	DefineProgressive	Open Ended				
On a scale from 1 to 10 rate the traditionalness of your current organization	RateTraditional	Rating 1 to 10				
On a scale from 1 to 10 rate your current organization's ability to meet the goals of the people you support	RateGoals	Rating 1 to 10				
How would you define quality services?	DefineQuality	Open Ended				
How would you define effective leadership?	DefineLeadership	Open Ended				

* There are several questions from the Community Living Attitudes Scale that were reversed, in that agreement with the question would be rated lower than disagreement. Responses to these questions have been inverted for the analysis.

Appendix B

IRB APPROVAL LETTER

DATE: July 11, 2019

TO: Caitlin Bailey, PhD ABD
FROM: University of Delaware IRB

Institutional Review Board

210H Hullihen Hall
Newark, DE 19716
Phone: 302-831-2137
Fax: 302-831-2828

STUDY TITLE: [1465013-1] Generational Differences in Leadership Practices
SUBMISSION TYPE: New Project

ACTION: DETERMINATION OF EXEMPT STATUS
EFFECTIVE DATE: July 11, 2019

REVIEW CATEGORY: Exemption category # *(4)*

Thank you for your New Project submission to the University of Delaware Institutional Review Board (UD IRB). According to the pertinent regulations, the UD IRB has determined this project is EXEMPT from most federal policy requirements for the protection of human subjects. The privacy of subjects and the confidentiality of participants must be safeguarded as prescribed in the reviewed protocol form.

This exempt determination is valid for the research study as described by the documents in this submission. Proposed revisions to previously approved procedures and documents that may affect this exempt determination must be reviewed and approved by this office prior to initiation. The UD
amendment form must be used to request the review of changes that may substantially change the study design or data collected.

Unanticipated problems and serious adverse events involving risk to participants must be reported to this office in a timely fashion according with the UD requirements for reportable events.

A copy of this correspondence will be kept on file by our office. If you have any questions, please contact the UD IRB Office at (302) 831-2137 or via email at hsrb-research@udel.edu. Please include the study title and reference number in all correspondence with this office.

INSTITUTIONAL REVIEW BOARD

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