

A CASE STUDY OF MEXICAN EDUCATIONAL LEADERS VIEWED THROUGH THE LENS OF THE SYNERGISTIC LEADERSHIP THEORY (PART 1)*

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1 Introduction

Over ten years ago, Hunt and Peterson (1997) debated that leadership is a global concept that should be studied scientifically and internationally. Others have pointed out that with the increase of globalization, more research is needed in order to understand the boundaries of current leadership frameworks across cultures (Dorfman & Howell, 1997; Helgstrand & Stuhlmacher, 1999). Accordingly, Dimmock (2000) and Mellahi (2000) indicated that leadership theories, policies, and practices have been transported worldwide and have been introduced to a variety of cultures and societies; yet, little research has been focused on whether such theories, policies, or practices are relevant to international cultures. The purpose of our case study was to examine the leadership of Mexican educational leaders in a non-public school setting² through the lens of a leadership theory, the synergistic leadership theory (SLT) (Irby, Brown, Duffy, & Trautman, 2002).

First, we review our rationale for employing the SLT as the theoretical framework. Next, we elaborate the methodological procedures of our qualitative case study, including context of the study, population and sample, instrumentation, data collection, data analysis, and validity and reliability of this qualitative research. Finally, we present and discuss our findings from the case study.

2 The Theoretical Framework: The Synergistic Leadership Theory

Several researchers have pointed out that traditional leadership theories in business and education in the United States (U.S.) have been representative of only White male leaders (Blackmore, 1989; Capper, 1993; Glazer, 1991; Shakeshaft, 1989; Shakeshaft, Brown, Irby, Grogan, & Ballenger, 2007; Shakeshaft & Nowell, 1984; Trautman, 2000); thus, such traditional Anglo-centric and male-biased theories not only limit applicability within U.S. mainstream culture, but also among other non-U.S. countries and cultures.

Irby, Brown, and Trautman (1999) analyzed the original development of 24 traditional leadership theories (Table 1) commonly taught in U.S. leadership and management courses. That initial analysis of the original theories published between 1939 and 1991 and still presented today in major leadership and management texts resulted in nine generalizations including these three:

1. Theory development was limited to male samples, as corporate leadership positions were exclusive to males at the time of the emergence of the theories;
2. Male-dominated agencies and/or corporations sponsored many of the leadership studies which led to leadership theories: military, Xerox corporation, General Electric, American Management Association, Exxon, Bell Telephone Labs, and Alfred P. Sloan Foundation; and
3. Although the theories did not include the female experience or females in the sample for development, these theories were generalized to both males and females.

We add two other generalizations related to the 24 commonly taught leadership theories to our original ones: (a) Although the 24 theories did not recognized diversity in terms of gender, ethnicity, or across cultures in their development, they have been generalized across cultures and ethnicity, and (b) While the theories have been generalized by broad-based common acclamation, the 24 theories have not been validated across genders, cultures, and ethnicities via sufficient, arduous studies.

²The references to the leaders and the school have been hidden under pseudonyms to provide anonymity in this publication.

An Analysis of 24 Leadership Theories

Name of theory	Primary writers
Leadership	
Iowa Studies	Lewin, Lippitt, & White (1939)
Leadership Factors	Stogdill, 1948
Ohio State Studies	Halpin & Winer (1952); Hemphill & Coons, (1950)
Theory X and Theory Y	McGregor (1957)
Performance-Maintenance	Misumi, 1958
Four-Factor Theory	Bowers & Seashore, 1966
Michigan Studies	Likert (1961)
Contingency Theory	Fiedler (1967)
Leadership Grid Styles	Blake & Mouton (1968)
Situational Leadership	Hersey & Blanchard (1969)
Path-Goal Theory	Evans (1970)
Transformational Leadership	Burns, 1978; Bass, 1990
Organizational Behaviors	
Social System Theory	Homans,1950; Getzels & Guba, 1955
Needs Hierarchy Theory	Maslow, 1955; Porter, 1964
Fusion Process	Bakke, 1953
Complex Learning Organizations	Etzioni, 1975
Structure in Fives	Mintzberg, 1983
Learning Organizations	Senge, 1990
Organizational Framework	Bolman & Deal, 1991
Functions of Executive	Barnard, 1938
3-D Theory	Reddin, 1970
Theory Z	Ouchi, 1981
Total Quality Management	Deming, 1988
Strategic Management	Nahavandi, 1993

Table 1

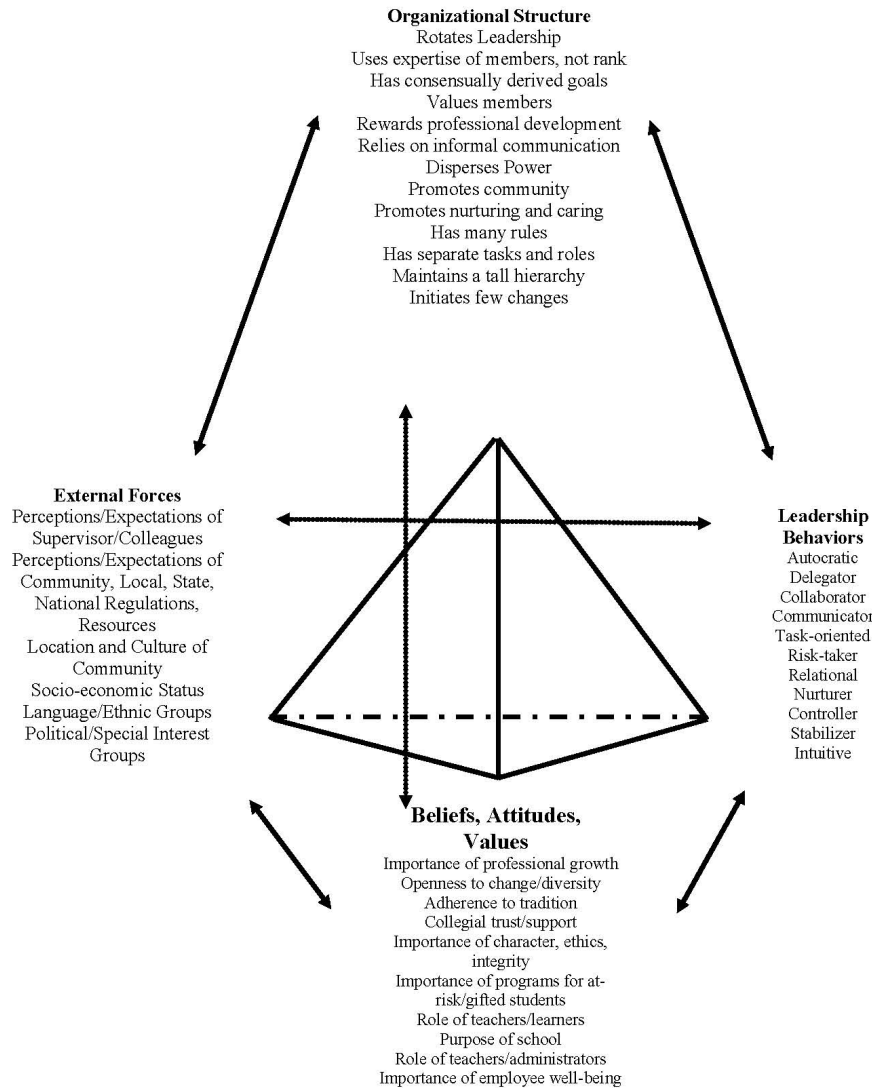
NOTE: Irby et al., 1999.

Concerned with the exclusive nature of the aforementioned leadership theories, Irby, Brown, and Duffy (1999) developed the SLT utilizing both quantitative and qualitative data gathered from (a) an exhaustive review of the literature, (b) surveys of 30 women leaders in education and business, and (c) open-ended interviews of 10 female school executives and 10 scholars in leadership preparation programs. Further, Irby, Brown and Duffy (1999) and Irby, Brown, and Trautman (1999, 2000) presented the theory in several scientific conventions and obtained feedback from scholars and practitioners in the field. The developers considered

the feedback from both males and females of varying ethnicities in furthering the development of the theory. Interested in ensuring the theory had validity with diverse groups, Brown, Irby, and Duffy directed several research studies based on the SLT with various ethnicities in the U.S.; however, the SLT had not been used as a theoretical framework in studies of leaders in other countries. Therefore, it was our desire to use the SLT as a theoretical framework, or a lens, through which we examined the leadership of two Mexican educational leaders in a non-public school in Mexico.

3 The Synergistic Leadership Theory

The SLT is based on the following major assumptions: (a) leadership is the interaction among four factors – attitudes, beliefs, and values; leadership behavior; external forces; and organizational structure and (b) an alignment of all four factors contributes to the leader and the organization being perceived as effective or successful, while a misalignment among the four factors generally results in negative perceptions of the effectiveness of the leader or organization (Irby et al., 2002) if left unaddressed. A tetrahedral model (Figure 1) depicts the SLT's four equal and interactive factors: (a) attitudes, beliefs and values; (b) leadership behaviors; (c) organizational structure; and (d) external forces (Irby et al.), which are identified by four stellar points with six interaction pairs. This model can be rotated on any apex and still maintain its shape, thereby indicating no structural hierarchy and suggesting that it is the dynamic interaction of each of the four factors that affects the perceived success of the leader. Following, each of the four factors of the SLT is described briefly.



*Examples under the factors are not all-inclusive.
 © 2000, Irby, Brown, and Duffy.
 This model appeared in Irby, Brown, Duffy, & Trautman, 2002.

Figure 1. Tetrahedral model for the synergistic leadership theory*

Figure 1: The SLT Tetrahedral Model

3.1 Factor 1: Attitudes, Beliefs, and Values

Daresh (2001) defined attitudes as “clusters of individual beliefs that survive the immediate moment” (p. 31). Beliefs refer to information that people hold to be true about a person, group, institution, or policy (Pratt & Margaritis, 1999). Values are the principles that guide behavior, and according to Daresh (2001), attitudes, values, and beliefs influence each other and are interconnected with the leader and the organization. Irby et al. (2002) pointed out, while attitudes and values remain constant, beliefs may change as new information is processed. In the SLT, attitudes, beliefs, and values are the foundation for guiding principles from which individuals operate daily. As illustrated by the model, attitudes, beliefs, and values are depicted as dichotomous, as an individual or group would either adhere or not adhere to specific attitudes, beliefs, or values at a certain point in time. Attitudes, beliefs, and values are manifested in actions, such as valuing professional growth, being open to change, and valuing diversity and integrity. The SLT affirms that the leader must be cognizant that unless there is congruence between attitudes, beliefs, and values and the other three factors of the theory, tension among the four factors will be evident (Irby et al., 2002) and should be addressed.

3.2 Factor 2: Leadership Behaviors

In the SLT, leadership behaviors describe particular actions of a leader. A broad array of leadership behaviors is included. These behaviors were compiled by Irby, Brown and Duffy from the literature on traditional male and female leadership behaviors and range from autocratic to nurturing. However, the SLT does not endorse a particular leadership behavior as a determinant or indicator for success or failure; rather, it implies that leadership behaviors may change in order to align the factors. Leadership behaviors, as suggested by the SLT, are behaviors such as (a) leads by example, (b) demonstrates ability to juggle, (c) is dependable, (d) communicates vision, (e) acts as a change agent, (f) shares power, (g) builds consensus, (h) has high expectations of self and others, (i) combines social talk with administrative talk, and (j) is efficient.

3.3 Factor 3: External Forces

External forces are outside influencers that interact and affect leaders and their organizations. Bolman and Deal (1997) gave some examples of external forces that create an unpredictable impact, including weather, local and federal laws, location, national and local politics, rapid urbanization, and civil rights movements. They pointed out that each of these forces challenges the system and causes dissatisfaction for at least one of the groups within the organization. Usdan, McCloud, Podmostko, and Cuban (2001) identified external influencers in the educational setting that are derived from state laws and regulations, federal mandates, decentralized school management, demands for greater accountability, the school choice movement, changing demographics, competing community needs, limited resources, legal challenges, partisan politics, and shortages of human resources.

External forces, represented in the SLT, are described as powers outside the control of the organization or the leader that interact with the organization and the leader and that inherently embody a set of values, attitudes, and beliefs. They may include, but are not limited to: (a) local, national, and international community expectations, practices, and conditions, (b) governmental regulations or laws, (c) demographics, (d) cultural and political climate, (e) technological advances, (f) economic situations, (g) policy-making boards or councils (Irby et al., 2002), and (h) direct supervisors.

3.4 Factor 4: Organizational Structure

Organizational structure is a term used to depict the organization’s framework for vertical control and horizontal coordination of the organization (Lunenburg & Ornstein, 2008). Examples of different organizational structures include: bureaucratic structure, participatory structure, immaturity vs. maturity, system 4 structure, transformational structure, site-based structure, and feminist organizational structure. The structure of the organization impacts behaviors, the flow and type of communication, and the relationships among

its members (Hernandez, 2004; Mintzberg, 1983); thus, different organizational structures have different characteristics and shape different practices.

In the SLT, organizational structure refers to the characteristics of organizations and how they operate. Organizational structure broadly determines (a) how power is distributed within an organization (Bamberg, 2004), (b) the range of flexibility or rigidity within the organization (Burns & Stalker, 1961; Ranson, Hinings, & Greenwood, 1980), (c) the range of centralization to decentralization within the organization (Goodhue & Thompson, 1995), (d) how formal or informal the communication is within the organization (Mintzberg, 1983), and (e) the focus of the organization.

The SLT presents organizational structures as ranging from open, feminist organizations to tightly controlled bureaucratic ones. For example, bureaucratic organizations are characterized by division of labor, rules, hierarchy of authority, impersonality, and competence; in contrast, feminist organizations feature participative decision making, systems of rotating leadership, promotion of community and cooperation, and power sharing (Irby et al., 2002).

4 The SLT and Other Leadership Theories

Although each of the four factors of the SLT may be found in the literature within other leadership theories and/or models, a distinctive feature of the SLT is that, observed in tandem, the four factors are equalized and interactive without hierarchical rank. Examples of some traditional theories that include parts of the SLT's four factors are: (a) the Ohio State studies, (b) the University of Michigan studies, (c) the managerial grid, and (d) situational leadership. While in these four theories, components or aspects of one or more of the four factors may be present, they exist either in isolation or in part or in a hierarchical arrangement.

Regarding leadership, in the Ohio state studies (Halpin & Winer, 1952; Hemphill & Coons, 1950), leadership is bifurcated into initiating structure and consideration and is suggested to be a style approach to leading subordinates in certain situations. The SLT, however, includes a *range* of leadership behaviors, as opposed to a broader leadership style, and considers organizational structure, external forces, and values, attitudes, and beliefs as each of those factors interacts with leadership behaviors. In the University of Michigan studies (Likert, 1961), the term, leadership behaviors, is mentioned; however, it consists of only two behaviors— employee orientation and production orientation. Further, the Michigan studies theory does not take into account a range of behaviors related to various situations, including time, place, and relationships, as does the SLT. An additional theory, Blake and Mouton's (1968) original managerial grid, focuses on identifying one of five leadership *styles* with relation to production versus people orientation. However, there are no specific generalizations relating a specific style to a particular situation. In contrast, in the SLT, the leadership behaviors are related to the organizational structure, to attitudes, values, and beliefs, and to external forces which comprise the situation within which the leader finds him/herself. Although the Hersey and Blanchard (1969) situational leadership model does relate leadership to situations, it focuses on leadership style and on the development level of the subordinates as noted in dyadic terms, with leaders interacting with employees in a given situation and adapting their style to match the development level of the employee. The SLT, however, takes the stance that leadership behavior is active and dynamic, interacting with organizational structures, values, attitudes, and beliefs, and external forces. In the Hersey and Blanchard situational leadership model, it is incumbent upon the leader to adapt to the employee. Conversely, in the SLT, several alternatives are available in order for the leader and the organization to accomplish purposes or goals. The leader may (a) adapt by altering leadership behavior based on a broad scan of all four factors, (b) attempt to alter the organization and external forces, or even modify attitudes, values, and beliefs of colleagues, or (c) analyze the situation with a systemic view of the four factors and determine that the position he/she finds him/herself in is not a fit. If this is the case, the leader may choose to leave the position and/or organization.

5 The SLT Related to the Study

We selected the SLT as the theoretical framework in our case study because the SLT has the following characteristics which render it potentially appropriate for other cultures: (a) postmodern views of inclusiveness, (b) non-hierarchical rank of factors, and (c) active and dynamic interactions of factors (Shapiro, 2009, Irby et al., 2002). The SLT emphasizes the equal and interactive relationship among the four factors and acknowledges the impact of alignment or misalignment among the four factors. The theory assumes that when there is an alignment among all four factors, the leader will be perceived as effective. On the contrary, a misalignment among the four factors results in tension which can have a negative impact on the perception of the leaders' effectiveness (Irby et al.). The SLT's emphasis on the importance of the alignment among the four factors implies that "no matter what values, beliefs, attitudes, leadership behaviors, organizational structures, and external forces are, the leader and organization can be perceived as effective if there is an alignment among the four factors" (Yang, Irby, & Brown, 2008, p. 18). The emphasis on alignment among the four factors does not mean that there will not be conflict, disarray, or turmoil in a leader's professional world; for indeed, if leaders find themselves in a chaotic situation where factors are misaligned, then there is a need to take action which may result in change and which, ultimately, should bring the factors back into alignment. In this sense, the SLT seeks regularity from irregularity or synergy from antagonism.

Since its development, Irby, Brown, and Duffy have directed studies of the SLT in order to better understand leadership practices and educational organizations (Bamberg, 2004; Hernandez, 2004; Holtkamp, Irby, Brown, & Yang, 2007; Kaspar, 2006; Ardovini, Trautman, Brown, & Irby, 2006; Truslow, 2004). Some additional studies have been conducted at Western Carolina University (Justice, 2007), Lamar University (Taliafero, 2007), and Virginia Tech (Jones & Leonard, 2009). Although the SLT has been validated for both males and females in a variety of contexts and across ethnicities in the U.S., until this current study, it had not been utilized as a theoretical framework in an international setting. However, prior studies of the SLT indicate that the theory has the potential for the use as a theoretical framework, or lens, for leadership in other cultures, because, foundationally, the SLT...

1. is contextual and situational (Holtkamp, 2001; Irby et al., 2002; Trautman, 2000), acknowledging the uniqueness of particular contexts and situations by taking in account multiple perspectives,
2. recognizes that culture is an external force that has a significant impact on leadership and organizations (Irby et al. 2002),
3. possesses explanatory power across a range of leadership positions and by gender and ethnicity (Ardovini et al., 2006), and
4. is practical and useful for understanding systems (Ardovini et al., 2006).

6 Context of the Study

Our qualitative case study was conducted with two Mexican leaders, one male and one female, of a private school in southeastern Mexico. We selected these leaders because of previous university/school collaborations and the leaders' willingness to be included in the study. According to these leaders, they led a non-governmental, nonprofit school established in 1985 with an objective to alleviate the injustices and the inequities that have existed among low-income youth across Mexico. The leaders (also founders of the school) endeavored to offer an alternative educational system the public education system that perpetuated the status quo. The alternative curriculum focused on basic survival, academic knowledge, social responsibility, and self-esteem skills. The purpose of the school was not to prove an educational model, but to do something to improve the life conditions of one of the most impoverished sectors of Mexican society. To reach these goals, the two leaders established three main premises that make up the foundation of the educational program: (a) developing a social base to solve problems and combat poverty, (b) empowering the children by making them active participants in the solution, and (c) encouraging the children to become productive as well as change agents in their community (Leader two, personal communication, June 14, 2000).

The leaders initiated the school in their home with three children from the streets, but at the time of our study the school served 1,500 children and youth and 250 families in the community. They designed the school to be a collaborative effort between the learners, educators, and the community to ensure that cooperative learning occurs to improve the whole child, the community, and ultimately, Mexico (Leader one, personal communication, June 14, 2000). The school's organizational structure included a main decision-making body comprised of the leaders, teachers, students, parents, community members, and sponsors, whose annual projects were supervised by an elected council. The organization's staff encompassed 20 members; 80% were women from multidisciplinary fields.

Additionally, to increase opportunities for Mexican indigenous youth by fostering and developing human competency and social and entrepreneurial skills, the leaders helped to create a community leadership program for children and youth. This program was presently implemented in 10 indigenous and rural communities in the state where our study was conducted. The program staff had trained 300 indigenous youths who worked with approximately 5,310 community children. The goal of the program was to assist these youngsters in becoming promoters and instructors in their community through working in adult literacy programs, community infrastructure improvement projects, ecological and reforestation projects, and local projects to beautify parks and green areas (Leader two, personal communication, June 14, 2000).

7 Researchers' Perspectives

Four researchers contributed to this project. One of the researchers (Researcher A) had been traveling to this part of Mexico every summer for six years prior to this study. Additionally, Researcher A served on the dissertation committee of one of the Mexican educational leaders at a private university in Mexico. This researcher, bilingual in Spanish and English, had visited the indigenous communities and had observed the leaders' projects in several Mexican communities. Researcher B also knew the leaders, as she had visited with them during meetings in the United States and in Mexico. Researcher B is an expert in leadership theory. The third researcher, Researcher C, is a native of Mexico and conducted the onsite interviews and observations. Researcher C gathered all the data. The final researcher, Researcher D, is competent in cultural contexts and the cross-cultural issues related to the SLT and has critiqued the theory in other cultural contexts.

8 Methodology

In our research design, we used a case study approach. Yin (1994) defined a case study as "an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident...[and] relies on multiple sources of evidence" (p. 13). Merriam (1998) and Stake (2005) identified a case study as an examination of a bounded system or case. Merriam further clarified a case study as "an examination of a specific phenomenon such as a program, an event, a person, a process, an institution, or a social group" (p. 9), which may be selected as an example of a concern or issue. Case studies can be descriptive, interpretative, or evaluative; but most of them are a combination of the three (Merriam, 1988). In our case study, we analyzed the leaders and others' perceptions of their leadership through the theoretical framework, or the lens, of the four factors of the SLT, and we described and interpreted the leaders' situation within their context of a non-public school of southeastern Mexico.

8.1 Participants

The case study focused on the two leaders of the school. However, the purposeful and convenience sample also included: (a) five instructional coordinators (four female, one male); (b) 16 school teachers, (five male, 11 female); (c) six high school student leaders (five female, one male); (d) six community educational leaders (five female, one male); and (e) 15 parents (13 females, two males). All of these groups were able to provide important information about the leaders, because each member in each group had known the leaders for at least three years.

8.2 Instrumentation

Two instruments were used to collect data: (a) face-to-face individual semi-structured interview questions and (b) semi-structured focus group interview questions. The interview questions were designed to elicit information related directly to the four factors of the SLT and the Organizational Leadership Effectiveness Inventory (Irby, Brown, & Duffy, 2000) which accompanies the theory. Form A was designed for the individual interviews with the two leaders (Table 2), and Form B was designed to be answered by focus group participants (Table 3). Face validity and construct validity of both Forms A and B were established by two subject matter expert university professors from the educational leadership department and through a pilot study with two U.S. bilingual school principals (Mexican American) and four bilingual faculty members (Mexican immigrants). The instruments were first written in English and then translated to Spanish. To check the accuracy of the translation, the instruments were then translated back to English from Spanish.

Interview Protocol for Two Founders

Form A (Spanish)
Part I
Por favor describa su estilo de liderazgo.
¿Qué tipo de conductas usted cree que debe de manifestar un líder?
¿Que tipo de características o conductas interpersonales debe de poseer un líder?
Part II
¿Qué tipo de fuerzas externas usted percibe?
¿Afectan su capacidad como líder?
¿Ha habido alguna ocasión en el que las fuerzas externas no hayan estado alineadas con sus creencias o con su filosofía?
¿Qué tuvo que hacer para crear una armonía?
Part III
Por favor describa las características de su organización.
¿Cree usted que sus empleados están de acuerdo con su filosofía?
¿Cree usted que sus empleados están de satisfechos con la organización?
Part IV
¿Qué tipo de valores, actitudes, y creencias debe de promover y fomentar un líder?
¿Cree usted que sus empleados están de acuerdo con su filosofía?
¿Cómo cree usted que sus empleados lo perciben como líder?
<i>continued on next page</i>

Form B (English)
Part I
Please describe your leadership style.
What type of behaviors do you believe a leader must exhibit?
What type of interpersonal characteristics should a leader possess?
Part II
What type of external forces do you perceive?
Do they have any effect on your ability to lead?
Has there ever been a time when the external forces were not in alignment with your beliefs or objectives?
What did you do to promote harmony?
Part III
Please describe your organization's characteristics.
Does your staff agree with your philosophy?
Do you believe that your staff is satisfied with your organization?
Part IV
What values, attitudes and beliefs should a leader emphasize?
Do you believe that your staff agrees with your vision?
How does your staff perceive your leadership?

Table 2

Interview Protocol for Focus Groups

Form A (Spanish)
Part I
Por favor describa el estilo de liderazgo de su líder.
¿Qué tipo de conductas usted cree que debe de manifestar un líder?
¿Qué tipo de características o conductas interpersonales debe de poseer un líder?
Part II
¿Qué tipo de fuerzas externas usted percibe?
¿Afectan la capacidad de su líder?
¿Ha habido alguna ocasión en el que las fuerzas externas no hayan estado alineadas con las
<i>continued on next page</i>

creencias o filosofía de su líder?
¿Qué tuvo que hacer para crear una armonía?
Part III
Por favor describa las características de la organización de su líder.
¿Cree usted que los empleados de su líder están de acuerdo con su filosofía?
¿Cree usted que los empleados de su líder están satisfechos con la organización?
Part IV
¿Qué tipo de valores, actitudes, y creencias debe de promover y fomentar un líder?
¿Cree usted que sus empleados están de acuerdo la visión de su líder?
¿Cómo cree usted que sus empleados lo perciben como líder?
Form B (English)
Part I
Please describe the leadership style of your leader.
What type of behaviors do you believe a leader must exhibit?
What type of interpersonal characteristics or behaviors should a leader possess?
Part II
What type of external forces do you perceive?
Do they have any effect on your leaders' ability to lead?
Has there ever been a time when the external forces were not in alignment with your leaders' beliefs or objectives?
What did he or she have to do to promote harmony?
Part III
Please describe your organization's characteristics.
Do you believe that the staff agrees with your leaders' philosophy?
Do you believe that the staff is satisfied with the organization?
Part IV
What values, attitudes and beliefs should a leader emphasize?
Do you believe that the staff agrees with your leaders' vision?
<i>continued on next page</i>

How does the staff perceive your leaders' leadership?

Table 3

8.3 Data Collection

Prior to the data collection, an approval for conducting research was obtained from the university committee for the Protection of Human Subjects. Additionally, before the interviews and focus groups, we obtained administrative consent, parental consent, and permission to videotape the session.

The data in our study were primarily gathered from interviews, focus groups, and information obtained by direct observation. One of the researchers spent 17 days on the school campus conducting field-based research. The subjects for the individual interviews included the two school leaders. Each of the individual interviews lasted 50 to 70 minutes. Four separate focus group interviews were: (a) one with six high school student leaders, (b) one with 15 parents, (c) one with five coordinators and 16 teachers, and (d) one with six community project leaders. All the interviews and focus group sessions were taped, transcribed verbatim, and translated into English. Observations were unscheduled, and the researcher tried to remain as unobtrusive as possible.

8.4 Data Analysis

Bogdan and Biklen (1998) regarded data analysis as an ongoing process that begins during the data collection stage. Likewise, data analysis for this study began while interviewing was in progress; this ongoing process led to minor modifications of the interview questions while providing direction and the possibility to clarify information in subsequent interviews. In data analysis, we followed Miles and Huberman's (1994) approach by reviewing the text, "trying out coding categories on it, then moving on to identify themes and trends, and then to testing hunches and findings, aiming first to delineate the 'deep structure' and then to integrate the data into an explanatory framework" (p. 91).

Four predetermined categories reflected the theoretical framework, the four factors of the SLT. Subcategories were identified during the initial interview coding process. These subcategories were initially identified with key words, such as *risk taker*, placed in the margins. Subcategories were tracked by using a color-coding system for the four main preordained SLT factor-based categories. Categories were entered into factor-based matrices (Table 4) and were used to draw conclusions, note patterns and themes, and make comparisons and contrasts. The categories were validated through researcher triangulation. Subcategories that emerged from the data analysis were triangulated among three of the researchers. Additionally, after each observation, the observing researcher summarized and reflected upon the field notes to find congruence between field notes and other data.

8.5 Validity and Reliability

Validity of the study was addressed by using methodological triangulation (interview, focus group, and observation), researcher triangulation, member checking, and low inference descriptors in reporting findings. Member checking addressed interpretive validity. After the transcriptions were finalized, we submitted transcripts for member checking by emailing to the participants the transcribed statements for accuracy and completeness; no changes or modifications were suggested. In addition, researcher triangulation occurred with two of the researchers reviewing all data and conducting the initial analyses; three of the researchers worked together to come to consensus regarding the data interpretation.

Assigned Categories Matrix

Person	Factor 1: Values, Attitudes, Beliefs	Factor 2: Leadership Behaviors	Factor 3: External Forces	Factor 4: Organizational Structure
1	Solidaridad pensar en función de los demás. Comunicación (19) Valores Humanos Fundamentales Formación de la Ciudadanía Formación Política	Alcance de metas (58) Liderazgo contextual Pone el ejemplo (10) Tiene expectativas altas (26) Persuasiva (29) Agente de cambio (53) Persistente (40) Comparte su visión (38) Liderazgo compartido (52) Democrática Flexible (21) Es reflexivo (9)	La SEPLa economía nacional	Se toma en cuenta a la gente (82) Se valora a los miembros como seres humanos (84) Liderazgo compartido
2	Convicción (44) Honestidad (5) Mejoramiento Profesional (1) Colaboración (24) Amor, compasión a la humanidad (28) Sinceridad Empatía (25) Tolerante a nuevas ideas Paciente Constante/perseverante (20) Valorar la amistad	Figura moral, pone el ejemplo (10)	La formación de los maestros Económico No existe la cultural del servicio Los padres de familia Las autoridades locales	Se toma en cuenta a la gente (82) Se valora a los miembros como seres humanos (84) Se comparte el poder (86) Le da sentido y significado a la vida por eso la gente se queda

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<p>3</p>	<p>Honestidad (5)Compañerismo (30)Colaboración (24)Se dan oportunidades Se fomenta la innovación (7)</p>	<p>Comunicación (19)Pone el ejemploSolidaridadGestorC- onciliadorIniciativaCompar- tidoOrganizador (64)Motivado (37)Involucrar a otrosEmpático (25)Influyente (54)Es organi- zador (64)</p>	<p>EconómicasLa comunidad (los caciques)</p>	<p>Organización no tradicionalAbierta al cambioCon metas a ayudar a los demásBusca el desarrollo personal, familiar y de la comunidadSe da oportunidadesSe Comparte el poder (86)</p>
<p>4</p>	<p>Integridad (5)Hon- estidadSacrificio- CompartirValores morales (84)</p>	<p>Liderazgo orto- doxoEntregaTra- bajoResponsible (42)Siempre hay algo que aprender (22)Re- flexivo (9)Decisivo (47)Agresivo</p>	<p>La estructura social y el sis- tema que ya caducoFuerzas sociales, políticas y religiosas</p>	<p>Existe una relación muy emocional entre la organización y los miembros</p>
<p>5</p>	<p>Integridad (88)Tomar riesgos (18)Hablar con la verdad (88)Le da importancia a los programas para niños y jóvenes de bajos recursos (6)Enfatiza la fuerza de carácter, la integridad, y la ética profesional (88)Fomenta la practica reflexiva (91)</p>	<p>ClaroDirecto (45)Influyente (54)Coraje/valiente (44)Liderazgo con- textualCompartir ideasPoner el ejemplo (10)Transfor- mador (36)Es- cucharTomar riesgos (48)Mo- tivador (7)Inter- pelar/Persuasivo (65)Capacidad de amar a tu país, a tu culturaLider- azgo de tipo moral Compartir</p>	<p>Política deshones- taEconómicasLas creenciasForma- ciónEl clérigo local</p>	<p>Es un proyecto, no una organi- zaciónEs una empresa social que tiene vidaUna proyecto con histo- riaUn proyecto en constante evolu- ciónUn proyecto en donde los miembros tienen diferentes niveles de compromiso</p>
<p><i>continued on next page</i></p>				

6	Comunicación (3)Honestidad (88)JusticiaVulnerabilidad	Democrático (47)Apodera (39)Saber escucharFlexible (21)Humano	Económica La pobreza local (71)	El compromiso con la organización surge del contacto y las vivencias dentro de la mismaLa gente encuentra un significado personal en esta organización
7	Respeto CongruenciaEntusiasmo	PracticoPreparación académica (6)AccesibleCalid- oFilosofía de si se puede (9)	Política	
8	Respeto Honestidad (88)Verdad (88)Se fomenta el crecimiento profesional (92)	Liderazgo situacionalFluctúa dentro de lo democrático y impositivo (16/47)Analítico (22)Transformadora (41)Inclusiva (45)	Economía (71)La comunidad y la población localLas autoridades locales	Es una escuela abiertaHay oportunidad para crecer personalmente (1)El compromiso con la organización surge del contacto y las vivencias
9	La superación personalLa posibilidad de cambiar (53)La honestidad (5)La solidaridadAmor por el trabajo	Democrático (16)Autoritario positivo (46)SituacionalToma decisiones (47)	Económicas	Se dan oportunidades de mejoramientoSe fomenta el crecimiento profesional (1)Se valora a los miembros como seres humanos (84)Existe un lazo emocional muy fuerte entre la organización y los trabajadores
<i>continued on next page</i>				

10	Humanitarios (84)EmpáticosSensibles (15)La igualdad	Visionario (8)Aquí hay varios tipos de liderazgo según la personaAgresivoNegociadorCarismáticoConciliadoraAgradableCompañeraComprensiva (46)	Recursos económicosLa escasez de maestros	Le da importancia a los programas para niños y jóvenes de bajos recursos (94)Estamos de acuerdo con la filosofía del proyecto
11	Crear en la gente acción inmediata Hacer todo con conciencia (76)Transformar la sociedadAutoestimaVulnerabilidadCrear en lo que hacesReflexión (9)IgualdadTener una actitud de servicioEnfatiza la fuerza de carácter, la integridad, y la ética profesional (5)Fomenta la practica reflexiva (9)	Motivador (37)Optimista Tomar riesgos (48)Persuasivo (65)ExigenteInspirante (37)Comparte su visión (38)Receptivo hacia nuevas ideas (7)	El dineroLa disposición para ayudarse a si mismosPolítica paternalistaLas leguas localesLas autoridades locales	La organización satisface mis necesidadesSe valora a los miembros como seres humanos (84)
<i>continued on next page</i>				

12	Honesto (5)Re- sponsible (42)Ve- razSentido a lo que hacesAmor a los semejantes- Querer y respetar a tu escuela, a tu familiaAuto estima	AgradabelQue es- tablezca confianza	La comunidadLa autoridad localLa SEP	Estamos de acuerdo con la filosofia del proyecto
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Table 4

NOTE: Numbers indicate correspondence with items in the OLEI.

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³<http://cnx.org/content/m33668/latest/>