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A measure of attributes and benefits of the co-leadership model: is co-leadership the right fit for a complex world?

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A Measure of Attributes and Benefits of the Co-Leadership Model:

Is Co-Leadership the Right Fit for a Complex World?

A Research Project

Presented to the Faculty of

The George L. Graziadio

School of Business and Management

Pepperdine University

In Partial Fulfillment

of the Requirements for the Degree

Master of Science

in

Organization Development

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by

Daryl K. Yankee

April 2017

This research project, completed by

DARYL K. YANKEE

under the guidance of the Faculty Committee and approved by its members, has been

submitted to and accepted by the faculty of the George L. Graziadio School of Business

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MASTER OF SCIENCE
IN ORGANIZATION DEVELOPMENT

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Abstract

The purpose of this research is to verify key attributes, benefits, and deficiencies of the co-leadership model. Does co-leadership encourage more thoughtful decisions, provide checks and balances, and better support in a complex environment? Explanatory sequential mixed method research was employed to determine qualitative and quantitative measurable impacts. A sample group of 14 co-leaders, formally and informally paired, from the profit and not-for-profit sector were surveyed. The survey consisted primarily of Likert-type Scale queries to test assumed attributes and benefits and open-ended questions used to identify unanticipated attributes, benefits, and deficiencies. In depth interviews were conducted with three individuals who have served under the co-leadership model to determine key factors that lead to successful implementation. Results were verified using inter-rater reliability and shared with participants in hopes that more organizations will recognize and endorse co-leadership as a legitimate model that better supports sustained leadership in an increasingly complex world.

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Chapter 1

Introduction

As the world becomes more complex the single heroic leader model may not be sustainable enough to guide organizations through volatile, uncontrollable, chaotic, and ambiguous (VUCA) times (Lahl & Egan, 2012). Single leaders working from a rigid, autocratic system may achieve consistent excellence, but at the risk of ethical violations and diminished quality of work life as seen with Bill Bellichick's New England Patriots. Single leaders working from a more Democratic or Laisse-Fair framework can achieve success but on a less consistent and predictable level as is the case with Tito Francona and the Boston Red Sox/Cleveland Indians.

In leading an emerging workforce in a high change environment no one person can be expected to possess all the skills and adaptive expertise necessary to sustain an organization. Bold visionaries may ignore the details. Conservative leaders may miss opportunities. Heroic leaders may micro-manage and defend their turf rather than share goals and gains. Co-leadership embraces a post-heroic inclusionary model that encourages the sharing of power to create stronger outcomes (Bradford & Cohen, 1998). Co-leadership brings together contrasting yet complementary styles and skillsets that can provide holistic vision and strategy.

Todays' executives face challenges and demands that require a broader repertoire of responses than one person can offer. The co-leadership model has historic roots dating back to the Roman times (Sally, 2002), and has been endorsed by one of the original Organization Development (OD) thought leaders: Bennis (1999). Yet there is not a significant body of research and writings on the subject. Even the definition is somewhat

cloudy, with searches turning up articles often describing a shared leadership model practiced in a vertical team setting rather than an equal pairing of leaders holding upper-level management positions. This study tests the attributes and benefits of co-leadership as practiced by equal partners at the top management and executive level, in a variety of sectors and settings. It is hoped that this model will achieve a greater sense of legitimacy and provide a more effective and sustainable platform for leaders guiding organizations through a complex and evolving world.

Definition

For the purposes of this study it was important to define co-leadership as the term is used to refer to several different models in the literature. The majority of search results produced research and writings on the subject of shared leadership. Also referred to as distributed leadership (Brown & Hosking, 1986), and collective leadership, these terms describe situations in which decisions and strategy are decided on by a group of emerging and appointed leaders. Oftentimes elements of leadership are distributed among individuals with certain skills and expertise for a specific project, then reassigned as situations and tasks change (Friedrich, Vessey, Schuelke, Ruark, & Mumford, 2009). Shared leadership is applied across vertical tiers of the organization and is not an equal sharing of roles and responsibilities between two individuals occupying roles at higher levels of the organizational chart.

Co-Directorship, defined by Alvarez and Svejenova (2005) as co-CEO's who share the top spot in an official capacity, represents a narrow sample pool too small for the purposes of this study. Examples of co-directorship in the for-profit sector have decreased significantly since a wave of mergers in the 80's forced the model on

unsuspecting executives. These forced pairings were too often arranged to satisfy shareholders rather than for the purpose of creating a supportive and dynamic partnership (Troiano, 1999).

This study focuses on research that speaks to specific co-leadership models rather than the broader based shared leadership or rigid co-directorship definitions. In order to leverage a robust sample of writings on existing leadership theory and recruit a representative pool of survey respondents, this study defines co-leadership as an equal sharing of the CEO or director-level management role, both formally and informally recognized by the organization under which they serve.

The Problem

In complex and chaotic times it can be lonely at the top. In 2011, Compass Point and the Meyers Foundation surveyed 3,000 non-profit executives and found that 70% of the sample reported feelings of isolation and that 67% anticipate leaving within five years. In an earlier study conducted in 2008 Compass Point found that a significant number of executives were burned out and planning to leave the sector. In conducting research around effective leadership training Hubbard (2005) discovered that the singular "heroic" model of leadership lacks the capacity to deal with uncertain and stressful environments. More recently, research by Ulhøi and Muller (2014) implied that intense change cycles coupled with increased technical demands lead to inefficient decision making under a single leadership model.

The Assumption

The phrase "Two heads are better than one" appears often in writings on co-leadership. This assumption is made based on research and existing theory citing traits

and benefits of the model. When organizations face highly complex challenges the skills and experience of a single leader may not be sufficient to manage change effectively (Arena, Ferris, & Unlu, 2011; O'Toole, Galbraith, & Lawler, 2002). Higher levels of performance are achieved due to the dynamic attention levels generated by two leaders challenging each other. O'Toole et al. (2002) cite the example of England's giant Asda supermarket chain's successful transformation efforts led by co-leaders "whom both admit that neither could have accomplished the feat as a solo act" (p. 75).

The Question

If we accept the conclusion that co-leadership is a legitimate model that, at its best, leverages the strengths and balances the weaknesses of well-matched individual leaders, and allows for bold and adaptive decision making in our increasingly complex world, why is it not more widely adopted? Would research capturing the qualitative and quantitative benefits provide the evidence that might move governing bodies to recognize the value of co-leadership and create training to nurture the model?

Organization of the Study

The model for this study was explanatory sequential mixed method research (Creswell, 2014). Through surveys and interviews following IRB approved protocol this study measured the characteristics of co-leadership as determined through a review of the literature. Respondents comprising a judgement sample group representing practicing formal and informal co-leadership in the for-profit and non-profit sector provided both quantitative and qualitative data measuring the attributes and benefits and deficiencies of the model. Questions around job satisfaction were benchmarked against global results. The survey tested the assumptions drawn from a review of the literature and also included

discovery questions. Survey results informed the creation of six interview questions that elaborated on and embedded these tacit assumptions.

An interrater team of three individuals reviewed the survey and analyzed transcripts of the interviews. The team cataloged and scored responses that corresponded with themes drawn from a review of the literature found in chapter 2 and also surface emerging themes. Averages of these scores are presented in chapters 4 of this study.

Deliverables

Chapter 5 of this study draws conclusions from the data that inform the structures under which co-leadership is successful or not successful, the key traits that individuals bring to partnerships, the attributes that fruitful pairings embody, and the benefits to the individual and the organization that an equal sharing of leadership responsibilities at the director and executive level provide. Themes and characteristics not found in the existing literature but present in the qualitative data analyzed by the researchers are also discussed in this chapter.

The implications of this study for individual leaders exploring alternatives to heroic leadership and organizations looking to limit turnover due to burnout are presented at the conclusion of this paper, along with recommendations for pursuing co-leadership as a formally recognized management process. Limitations of the study are recognized, followed by recommendations for future research which add to the understanding of the barriers and opportunities inherent in co-leadership. The study concludes with a call for the development of training and talent management tools that encourage and support this model as a legitimate form of leadership to address the challenges of developing adaptive and sustainable organizations in an increasingly complex world.

Chapter 2

Review of the Literature

The purpose of this study was to examine the concept of co-leadership; two individuals equally sharing roles and responsibilities at the director and executive level. This chapter seeks to define co-leadership as distinct from the broader concept of shared leadership. The limited body of existing work on the subject is discussed. What has been written is examined from a historical perspective mapping the evolution of co-leadership from Roman times to an apex of interest in the 1990's. Following this summary the study describes the attributes, benefits, and deficiencies of co-leadership present in research and writings up to the present. The chapter concludes with a section outlining what is missing from the literature and what this study may contribute to the body of research on the subject.

Co-Leadership Distinct from Shared Leadership

A review of the literature revealed a relatively small sample of research and data supporting the validity of co-leadership, as defined in the introduction of this study as an equal sharing of roles and responsibilities at the director and executive level (Troiano, 1999). There isn't a body of literature speaking directly to the benefits of co-leadership to individuals and their organizations. What does exist is research describing shared leadership as a system-wide, vertically integrated value and practice (Pearce & Conger, 2003).

The definitive literature review on shared leadership as a broader concept was published by Aarhus University, Denmark. In "Mapping The Landscape of Shared Leadership; A Review and Synthesis," Ulhøi and Müllerthey (2014) researched selected

definitions of shared and distributed leadership in the literature since 1988 and divided it into themes and trends. Of the sixteen different forms of shared leadership mapped by the duo only one example presented by Sally (2002) was defined as co-leadership.

Although co-leadership is mentioned in writings on shared leadership, there is a distinction and a unique set of challenges and opportunities that come from equitable partnerships at the highest levels. What follows is a distillation of the literature specific to this study's definition of co-leadership. The history, practice, and tacit assumptions drawn from published works around the subject are mapped in this chapter. Despite its origins in ancient Rome (Sally, 2002), co-leadership is still an emerging model with opportunities for refinement and definition that will lead to further adoption and practical application.

History

Roots in Rome. In his definitive article, "Co-Leadership: Lessons from Republican Rome," Sally (2002) breaks out key principles that provided the framework for successful practice. The model was evident in all levels of leadership and sustained through growth and conflict over a span of four centuries. The Romans established a number of rules, norms, structures, and behaviors that history reveals as critical, that correspond to modern research, and translate directly to organizations incorporating co-leadership today (Sally, 2002, p. 87):

1. Co-leaders arrive and depart together.

2. Co-leaders must have no chance of immediately and permanently ascending to solo leadership.

3. Co-leaders' assignments must be "lot-worthy." (Determined by chance).

4. There may be two leaders, but there is one office.

5. Co-leadership is part of a system of general power sharing.

6. A co-leader has formal veto power over any decision.

7. When called upon, co-leaders have to sacrifice "their own."

8. A co-leader never speaks ill of the other to an audience of any size.

9. Successful co-leaders capitalize on their duality.

10. A co-leader must practice a certain degree of self-denial and humility.

     Merger-Mania. The co-CEO model came to prominence in the 1980's. The wave of mergers and acquisitions forced companies to accommodate top leaders from both organizations to appease stakeholders and establish a sense of continuity. The majority of these pairings failed due to unequal power dynamics imposed by the company that held the most leverage in the acquisition. Partnerships eroded and were dissolved once shareholder confidence was stabilized (Troiano, 1999).

     These merger-driven "marriages" were forced onto CEO's, rather than emerging out of a working relationship built over time. The trust required to equally share responsibilities and make difficult collaborative decisions regarding downsizing and consolidation could not be manufactured out of necessity, as was evidenced by the unsuccessful pairings at Citigroup and Morgan Stanley. Successful co-leaders share key attributes and have the desire to work together. The majority of the co-CEO pairings resulting from M & A's in the 80's were not effective because the individuals did not value co-leadership but instead saw it as a barrier in their path to the top (O'Toole et al., 2002, p. 72). Not all co-CEO partnerships were doomed to fail. The financial sector saw successful partnerships thrive, most notably with Goldman Sacks (Troiano, 1999).

An endorsement, and then what? In 1999, leadership guru Warren Bennis co-authored a book with David Heenan entitled "Co-Leaders: The Power of Great Partnerships" that extoled the virtues of co-leadership at the COE/COO level. Including examples of specific co-CEO pairings, the overall focus and tone of the book was to discredit the celebrity of the single heroic leader and acknowledge the contributions that a strong second in command brings to the table. The authors mapped many of the attributes, benefits, and deficiencies cited in this study (see Table 1) and concluded with a ringing endorsement of the co-leadership model.

Some researchers assumed such strong support from one of the thought leaders in Organization Development would spur a wide spread adoption of the model. Instead, as O'Toole et al. (2002) noted, "Without creating a ripple, 'Co-Leaders' disappeared into that vast sea of unread leadership tomes. Our own research received a hearing in 2000 at the World Economic Forum in Davos, Switzerland, but the findings were received with indifference." They concluded that thousands of years of cultural bias towards singular leadership presented a nearly insurmountable barrier.

> Plato wrote that leadership is a rare trait, typically possessed by only one person in any society, an individual who has a unique lock on wisdom and truth. Later efforts by Plato's pupil, Aristotle, to demonstrate that wisdom is never the sole province of one person fell on deaf ears. (p. 65)

Traits and Trends as Found in the Literature

As Sally (2002) admitted,

Simply placing two leaders at the helm does not guarantee that both will grasp the tiller and steer in the same direction, or that one will not be swiftly pitched overboard? Smooth sailing, as the Romans understood, can only happen if the co-captains are embarked on the right kind of voyage, are supported by certain organizational structures, and are acting in appropriate ways. (p. 86)

Through examination of research and writings from the past decade and a half, traits of the co-leadership model including the attributes that lead to success, the benefits to individuals and the organizations, and deficiencies that practioners must be aware of have emerged. O'Toole et al. (2002) observed that factors for success include role origination, if they arrived as a team or individually, and "how complementary the skills and emotional orientations and roles of the leaders are" (p. 71). The remainder of this chapter maps the traits as found in the literature and form the basis for this research study.

Attributes. Bennis and Heenan (1999) drew the analogy of effective co-leadership to a well-functioning marriage: "There is the same affection, trust, and commitment to a common enterprise. Labor is divided easily, according to the gifts of both parties. Disagreements are resolved without acrimony and without loss of mutual respect" (p. 263). Beyond the obvious qualities of effective communication and authentic servant leadership, co-leaders must be able to shift responsibilities and decision making situationally and develop commonality around key issues (O'Toole et al., 2002). A five year study by Wagner and Muller (2009) conducted for Gallup Press identified trust, acceptance, forgiveness, communicating, and unselfishness as critical components of collaboration. These separate studies concluded there is no single personality type more suited to the model; that it was the presence and cultivation of key traits that created successful partnerships.

Structure. Partners with very different personalities have formed effective leadership teams under the terms and conditions established by the Roman model. One structure that is repeated throughout history is that co-leaders arrive and depart together

(Sally, 2002). This ensures an equitable entrance, a shared learning experience, and eliminates competition for the throne. Another structural support element the republican partisans identified as critical was a flat organization where control is spread across the system.

Although there are examples of successful forced pairings from the merger era, the vast majority of sustainable partnerships have emerged from existing relationships and involve individuals who chose their partners. Research on board or market-driven pairings in dance and theater organizations by Bhansing, Leenders, and Winjinberg (2012) showed that forced selection structure had an adverse effect on performance. The dual leadership pairings they studied had separate functional roles and objectives, which they believe created a barrier to creating a set of shared values and trust.

Balanced egos/no scorekeeping. Sally (2002) concluded that eliminating the contest for a solo spot at the top brings stability to senior leadership as collaboration becomes the focus of the work rather than competition. One might assume that individuals lacking ego make the most supportive and humble partners. While it is true co-leaders must practice a certain degree of self-denial and humility (Sally, 2002; Wagner & Muller, 2009), Bennis, among others, asserted that only those with healthy egos have the confidence to share in leadership and allow themselves to be persuaded. Emotionally intelligent, qualified leaders can manage the technical division of duties. Equally important is the sharing of credit. Dividing up the accolades can be a deal breaker, as was the case at Disney and Citigroup (O'Toole et al., 2002).

Part of the ego agreement is to never speak negatively of each other. A united front built from obvious mutual respect is essential in maintaining buy-in from

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subordinates and stakeholders. The benefits of duality, discussed below, are compromised if subordinates feel that they can play co-leaders off each other, and the comfort "mom & dad" qualities of the model bring can become a deficiency if employees learn they may get a different decision depending on whom they approach. Co-leaders must protect each other even as they disagree, sometimes fiercely, behind closed doors. They must be "Candid in private, discreet in public" (Heenan & Bennis, 1999, p. 13).

Strengths and weaknesses. Research shows the chance of success is increased when leaders differ in complimentary ways. One leader may be task-driven while the other provides emotional leadership. A visionary will be balanced by a detail-driven leader. While serving as co-CEO for Avis in the 70's, Robert Townsend wrote a book, "Up the Organization," in which he posited that it was crucial for co-leaders to "split up the chores, check in advance on strategic matters, and keep each other informed after the fact on the daily disasters" (O'Toole et al., 2002, p. 68).

As it relates to a VUCA environment, co-leadership structure allows for "cognitive heterogeneity" – a purposeful dissimilarity, made necessary as industries specialize and respond to an ever expanding variety of stakeholders (Bhansing et al., 2012). Peter C. Davis, management consultant at Booz-Hamilton & Co. in New York also advocates for complimentary skillsets, taking caution to avoid redundancies by defining strengths and responsibilities while "establishing a clear, unified vision of where the company is heading" (Troiano, 1999, p. 41).

Shared values/trust. In order to share power equally, defend and fully support each other's action's in public, and defer when appropriate co-leaders must have a high level of trust and a shared set of values to draw from. Based on their own experience with

the model and research, Holmberg and Söderlind (2004) presumed that the main ingredients for success were shared values and prestige-less trust.

Benefits. The pace of change and high degree of complexity facing organizations place great demands on leaders. Research on the language of co-leadership conducted by Vine, Holmes, Marra, Pfeifer, and Jackson (2008), led them to conclude that managing those demands with a partner is more effective as well as less stressful. Single leaders operating in a VUCA theater lack the extensive array of skills and competencies required to adapt and manage change, therefore necessitating a partnership to meet all of the needs of the organization (Arena et al., 2011).

There are cultural benefits that come from shared/servant leadership modeled by co-leaders. In an article entitled "Sharing the Throne" examining co-leadership under a broader shared leadership model, Troiano (1999) observed that within this structure command systems shift to a more inquiry-based supervisory style rather than telling from the top down, and that transparency is increased. Additional benefits to the individual and organizations gleaned from the literature are detailed below.

Checks and balances. By its very nature, co-leadership offers checks and balances in the form of collaborative decision making and the elimination of unilateral action (Higgins & Maciariello, 2004). The model is not necessarily about agreement, it is characterized by alignment of sometimes conflicting points of view (Troiano, 1999).

Checks and Balances also integrate and stabilize disparate personal styles. Individuals are rarely able to effectively toggle between contrasting styles, such as task-focused versus relational management in an authentic way (Karambayya & Reid, 2009). Cases in which one leader is reactive and impulsive call for a partner who will "check"

those tendencies by offering calm and balance. Co-leaders typically bring complementary and contrasting temperaments and perspectives that remove the influence of a singular dominant style (O'Toole et al., 2002).

Ethics. The same checks and balances that promote better decision making, encourage opportunity risks, and provide depth of leadership style also reduce the potential for corrupt behavior (Pearce et al., 2008). According to Kipnis (1976), leadership executed under the singular heroic model sets the stage for corruption by centralizing power. Wagner and Muller (2009) found that the pressure put on a single leaders to be all things to all stakeholders exaggerated character flaws. Co-leadership introduces an additional layer of accountability as it eliminates the ability to act unilaterally, which increases the chance that both partners will act responsibly and ethically.

Duality. A common trait that yields significant benefits is the practice of playing off each other. Duality, commonly referred to as good cop/bad cop, allows co-leaders to fully vet issues and draw out all the facets of the proposal or conflict by displaying their private dialogue in public (Sally 2002). Historically, the military has used drill instructors to play the heavy and training instructors to act as a coach. Much has been written, particularly by Drucker (1967), about the benefits conflict can have on the decision-making process. The duality of co-leadership compels managers to defend their rational and crystalize their thinking (Mashburn & Vaught, 1980, p. 56).

Ancillary to the benefits of duality are the parallels to the family leadership structure of a mother and father, with each partner exercising authority in different areas while maintaining a united front. Employees find familiarity and comfort when led by co-

leaders who display these qualities (Mashburn & Vaught, 1980). Fletcher (2004) posited that heroic leadership employs a masculine focus on "how to produce things," while the feminine logic of "how to grow people" characterizes post-heroic leadership. Well matched partners may bring a balance of both to co-leadership.

Decision making. The Romans inserted veto power, the prevention of unilateral action, as a structural component to promote more robust discussions prior to deciding (Sally, 2002). The depth of understanding and communication are heightened, thereby improving the quality of the decision-making process. Vince DiBianca, Senior VP of the DiBianca-Berkman Group stated, "The best leaders are the ones who have the insight to capture the collective wisdom of the organization they are running. This most often happens when power is shared" (Troiano, 1999, p. 41).

Opportunity risks. The ability to identify opportunities to stretch and expand programming and services, "opportunity risks" as defined by J. Reuvid (2014), is enhanced under a strong partnership. The co-leader management model improves strategic leadership by providing support and focus while measuring the pros and cons of significant change. Research conducted by Alvarez and Svejenova (2005) concluded that co-leaders feel more confident with risk due to the additional rigor and dialogue two heads bring to the process.

Fulfilling supported work. Successful co-leaders profiled throughout the literature report a greater sense of satisfaction and support as a result of sharing responsibilities with a partner. "Camaraderie grounded in shared accomplishment is one of the pleasures of any happy workplace" (Bennis & Heenan, 1999, p. 16). Throughout the writings runs a thread of anecdotal evidence supporting the notion that "together we

are better," that having a partner at the top to share responsibility, act as a sounding board, and accentuate strengths while supporting weaknesses leads to greater job satisfaction and longevity.

Deficiencies. There are pitfalls and drawbacks to the co-leadership model. Most as a result of deviations from defined structures and attributes as outlined above. All leadership models can be compromised by poor communication and clashes of ego. Deficiencies that are more exclusive to the co-leadership model include the loss of corporate focus when co-leaders are not able to compromise due to competition for power and status (Arena et al., 2011), a lack of accountability due to diffusion of duties (Troiano, 1999), and role ambiguity as result of shared responsibility (Mashburn & Vaught, 1980).

Perhaps the deficiencies most unique to co-leadership are those of subordinate confusion and "idea shopping" – the shadow side of the mom and dad benefit (O'Toole et al., 2002). Having two leaders sharing decision making power may encourage employees to play one against another if a united front has not been established. If values and decisions are not consistently displayed, it increases ambiguity and the temptation to seek a different outcome by approaching one partner over another. Their analysis concluded that the division of responsibilities was not as critical as clarifying roles and communicating them effectively to each other and the organization at large.

Table 1

Co-Leadership Model Traits as Found in the Literature

Attribute		
Structure		
• Start and finish together	Sally (2002)	Journal review of co-leadership from Roman times to the modern era.
• Self-selected or appointed	Bhansing, Leenders, and Winjinberg (2012)	Study of dyadic data from 51 directors of theater and dance companies.
• Decision making equivalency	Higgins and Maciariello (2004)	Study on the collaborative capacity of interdisciplinary work teams.
Balanced egos	Arena, Ferris, and Unlu (2011)	Study of the phenomenon of co-CEOs within publicly traded firms.
	Bennis and Heenan (1999)	A volume studying examples of co-leadership across multiple sectors.
	Sally (2002)	
	Wagner and Muller (2009)	Five year Gallup study of the power of partnerships.
• No scorekeeping	O'Toole et al. (2002)	Journal review of research and writings on shared leadership.
Strengths and weaknesses	Alvarez and Svejenova (2005)	Study of shared roles and responsibilities between teams of 2-4 executives.
	Arena et al. (2011)	
	O'Toole et al. (2002, p. 68)	
	Pearce and Conger (2003)	A volume on conceptual, methodological, and practical issues for shared leadership.
	Troiano (1999, p. 41)	Journal review on co-CEOships as a result of M & A's and co-leadership as a conceptual model
• Cognitive heterogeneity	Bhansing et al. (2012)	
Shared Values/Trust	Hennan and Bennis (1999)	
	Holmberg and Söderlind (2004)	Masters of Business Administration Management thesis review of the literature and analysis of shared leadership as a future leadership style.
	O'Toole et al. (2002)	
	Troiano (1999)	

Table 1 (Continued)

Attribute, benefit, or deficiency	Author and source	Research method or context
Benefit		
Checks and balances	Higgins and Maciariello (2004)	
	Karambayya and Reid (2009)	Case studies on the conflict dynamics of dual executive leadership in performing arts companies published by the Tavistock Institute.
	O'Toole et al. (2002)	
	Troiano (1999)	
Ethics	Kipnis (1976)	Psychological research on power and corruption.
	Pearce, Manz, and Sims (2008, pp. 353, 357)	Journal review on executive corruption and shared leadership as a moderator.
	Wagner and Muller (2009)	
Duality	Mashburn and Vaught (1980, p. 56)	Review of the positive benefits of dual leadership.
• Good cop/bad cop	Sally (2002)	
Decision making	Bradford & Cohen (1998)	Book studying shared leadership.
	Sally (2002)	
	Troiano (1999)	
Opportunity risks	Alvarez and Svejenova (2005)	
Fulfilling supported work	Bennis and Heenan (1999, p. 16)	
	Vine et al. (2008, p. 341)	Exploratory empirical study of the interactional sociolinguistics that co-create leadership.
	Wagner and Muller (2009)	
Deficiencies		
Loss of focus	Arena et al. (2011)	
Lack of accountability	Troiano (1999)	
Role ambiguity	Mashburn and Vaught (1980)	
Subordinate confusion/idea shopping	O'Toole et al. (2002)	

What Is Missing?

  A review of the existing literature reveals that the tangible benefits of this model in a complex and chaotic environment have not been fully captured and quantified. Perhaps this is why, despite such heavyweights as Warren Bennis providing their stamp of approval, co-leadership has not been fully embraced. There is a lack of research and pedagogy developed to support and promote the equitable sharing of top management positions with two well-matched individuals. The purpose of this study is affirm the attributes and establish clear benefits that will encourage organizations to invest in a leadership approach that is proven to be more effective and sustainable in our increasingly complex world.

Chapter 3

Research Design

Approach

A mixed method of qualitative and quantitate research was utilized to test theory and gain a more complete understanding of the measurable and tacit attributes, benefits, and deficiencies of the co-leadership model. Mixed methodology refers to the collection and analysis of both open-ended (qualitative), and closed-ended (quantitative) data. The strengths of mixed method research is the ability to pull from both qualitative and quantitative data and minimize the limitations of using a single approach (Creswell, 2014). An Explanatory Sequential mixed method design merging data collected through a survey of 14 individuals practicing the model both formally and informally, followed by interviews with three individuals with experience as co-leaders who opted-in from the survey pool was employed to quantify then ground the theories of co-leadership as a valid model (see Figure 1).

Sampling

Since this study involves individuals practicing a unique leadership model across multiple organizations and sectors, many methods of sampling were eliminated from consideration. There is no current data that captures the number of leaders and organizations practicing co-leadership, so panning to determine the total population by units or elements was not possible. Applying an appropriate standard error formula to arrive at a sample size was also not feasible (Albaum, Smith, 2010). For these reasons as well as cost and time considerations, a nonrandom process was used to define a sample size of 14 respondents for the survey phase and three for interview data collection.
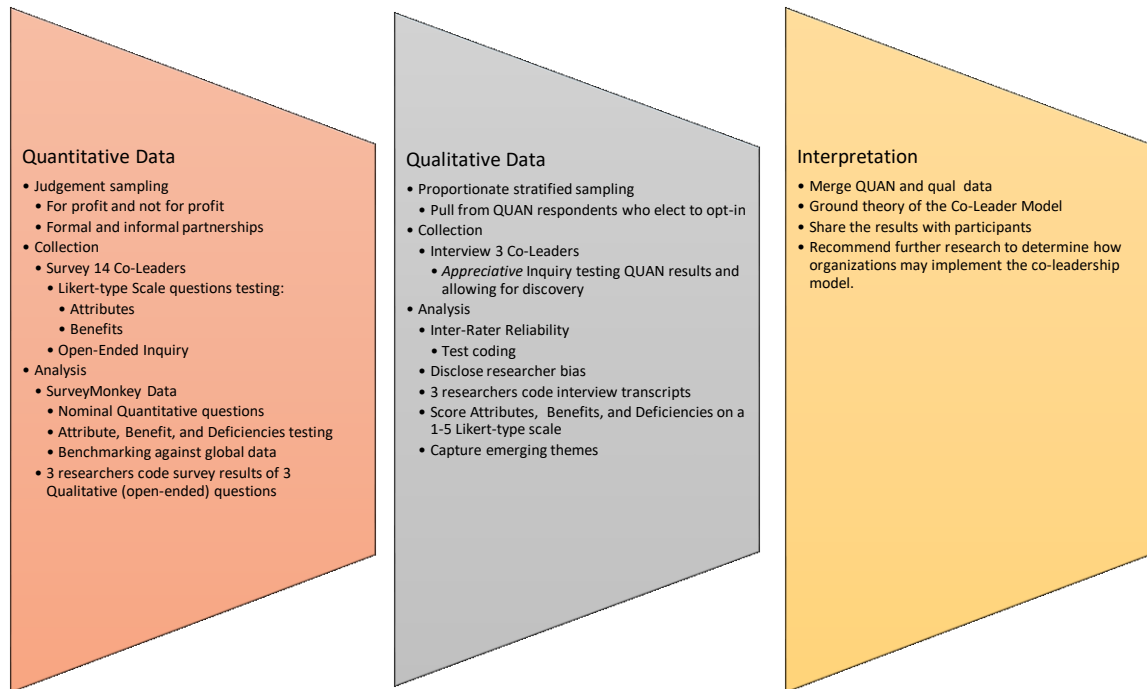
Figure 1

Explanatory Sequential Mixed Method

The judgment sample. Smith and Albaum (2010) define judgement sampling as

using sound judgement and strategy to select a representative pool of respondents.

Advantages include cost-effectiveness and efficiency with results as equal to probability

sampling. A weakness they note is without objective criteria there is not a clear way to

identify typical cases to study (p. 130). In order to mitigate this survey candidates were

recruited through social networks with a business focus such as LinkedIn and Yammer,

and the researcher's professional OD networks. The objectives of the study – to measure

and validate qualities of co-leadership were clear stated. Requests were worded to

specifically identify individuals at the upper management level who have been sharing

roles and responsibilities with a specific partner for a minimum of one year. From this

pool every attempt was made to draw a proportionate stratified sampling based on

assumptions that this model is practiced in the for-profit and non-profit sector and that gender equity is the norm.

Data Collection

Because co-leadership is not a wide-spread phenomenon, particularly in the researcher's region, the majority of data collection was conducted via online survey and a virtual meeting platform. This factor limited the use of informal strategies such as casual conversations and incidental observation (Maxwell, 2013) and informed the decision to embed the qualitative (in-depth) data within the larger quantitative (generalized) sample (Creswell, 2014). It also made purposeful selection (Maxwell, 2013) critical, as only participants comfortable working virtually and able to establish a rapport without actual face-to-face contact could provide meaningful feedback.

The multi-site nature of the sampling called for some measure of pre-structuring in order to reduce the amount of data that required analysis (Miles & Huberman, as cited in Maxwell, 2013). A survey was created by selecting pre-vetted questions from evaluation tools compiled in "Taking the Measure of Work: A Guide to Validated Scales for Organizational Research and Diagnosis" by Fields (2002), certified and benchmarked questions from SurveyMonkey, and questions developed by the researcher. The survey was distributed to respondents and results collected using an online survey tool. The survey was open for a two month period. Interviews with three individuals who had participated in the survey lasting an average of 45 minutes were conducted over a 14-day period at the conclusion of the survey. IRB protocol was followed during both the survey and interview phase.

Quantitative data. The majority of the 57 survey questions were presented in Likert-type Scale format (Marques & McCall, 2005) in order to facilitate analysis and measure assumed (tacit) attributes, benefits, and deficiencies (see Table 1). Three open-ended questions to discover additional traits not presented in the existing literature or previous research were included in the survey. For a complete view of the survey see Appendix A. A sample pool of 14 participants representing the for-profit and non-profit sector, directors and managers, male and female completed the survey. This sample size was within the scope of resources available to the primary researcher to recruit respondents.

Prior to soliciting responses, the survey instrument was presented to a three person sample pool to test clarity of the questions and the timing. The goal was to allow participants to complete the form online using the Survey Monkey application in 15 minutes or less. Following the approved IRB process, participants were allowed to remain anonymous, however they were asked to answer three questions to operationalize the resulting measurements and inform qualitative follow up (Creswell, 2014) that could provide a very limited potential for identification:

1. Is your co-leadership role formally recognized by your organization?
2. Do you work in the for-profit or non-profit sector?
3. Is your rank equal to that of your leadership partner?

Details of how questions and statements were linked to the characteristics of co-leadership are found in chapter four of this study.

Qualitative data. Follow up interviews with three individuals identified from a pool of survey participants as being representative of the three sectors were conducted via

on-line video chat and phone by the primary researcher. The interviews were recorded and transcribed for accuracy and ease of analysis by the research team. Six questions were created to explore the results of survey data, with the purpose of elaborating and clarifying the attributes, benefits and deficiencies of the co-leadership model. Interviewees were given the opportunity to explore how these qualities interact. Responses were not held to a specific limit in order to allow time to fully express their individual perceptions (Fields, 2002).

Measurement

The survey results were analyzed first to inform and plan the interview phase (Creswell, 2014). The Likert-type Scale questions were coded on a scale of 1-5, with 5 being the strongest affirmative validation score. Open ended interview questions were analyzed to examine the degree to which the answers correlated with the assumptions (i.e., convergent validity; Fields, 2002) and coded according to a 1-5 scale by the research team using inter-rater reliability tests (see Table 6).

The three qualitative interviews were conducted over the course of two weeks by the primary researcher via virtual meeting technology. The content was recorded and transcribed by an independent firm. Interviews consisted of six questions used to clarify and elaborate on the quantitative findings. The research team of three individuals then coded the responses from 1-5 on a Likert-type scale with 5 representing the strongest validating score. Answers that introduced attributes, benefits, or deficiencies not previously discovered were noted and mapped for inclusion in the emerging trends (see Table 7) and future research recommendations at the conclusion of this study.

Interpretation. In accordance with explanatory sequential mixed methodology, the quantitative and qualitative data were merged to offer a more complete picture of co-leadership. A team of the author and two volunteers, one a professor and a retired project manager discussed the importance of the findings in relation to the research questions and sought consensus. Data from the interpretation phase is included in the results section of this paper.

Validity

Both the quantitative and qualitative data were tested for inter-rater reliability: "evaluating the degree of agreement of two observers observing the same phenomena in the same setting" (Tashakkori & Teddlie, 1998, p. 85). Use of this method as a solidification tool validated the findings to a level of believability, allowing for the generalization of the conclusions (Marques & McCall, 2002, pp. 439-440). Through the employment of SurveyMonkey's Global Benchmark feature some of the theoretical benefits of co-leadership were measured against thousands of responses from a global sample group.

Costly and time-consuming validation efforts were not particularly crucial for this study (Fields, 2002). Validity, "the correctness of a description, conclusion, explanation, interpretation, or other sort of account" (Maxwell, 2013, p. 122), is dependent on "the relationship of your conclusions to reality, and no methods can completely assure that you have captured this" (p. 121).

The relationship of attributes and benefits, and deficiencies measured in the quantitative phase of this study to the assumptions drawn from the literature point to the construct validity of the research (Fields, 2002). The exceptional characteristics of the co-

leadership model interpreted from the qualitative data were easier to identify when employing a comparison test against traditional leadership literature and global benchmarking (Maxwell, 2013, p. 129).

Researcher bias. The author of this research has operated in an informal partnership under a variation of the co-leadership model. He serves a Director of Operations under an Executive Director. Qualities of the partnership include a significant number of the attributes described in the research, however the Executive Director holds final authority in all decisions and is compensated at a different level. Research was conducted with critical subjectivity as defined by Reason (1988):

> a quality of awareness in which we do not suppress our primary experience; nor do we allow ourselves to be swept away and overwhelmed by it; rather we raise it to consciousness and use it as part of the inquiry process. (p. 12)

Possible bias may manifest by omitting or ignoring data that does not support the assumptions (Maxwell, 2013). The inclusion of other researchers in analysis and interpretation as well as transcriptions of the interviews makes possible bias insignificant.

Inter-rater reliability. In order to validate the coding of qualitative data by two or more researchers, reliability was tested by the extent to which the results coincided with each other. The use of inter-rater reliability, "the extent to which two or more individuals (coders or raters) agree" (Marques & McCall, 2005, p. 442), is wide spread in the validation of measurement instruments such as questionnaires, tests, and personality assessments (Gwet, 2014). The nominal data gathered (gender, sector, role, etc.) does not require an inter-rater reliability test as the values were self-reported by the participants and did not require coding. In the case of ordinal data (attributes, benefits, and deficiencies) not captured on Likert-type scale but interpreted by raters, inter-rater

reliability was tested by evaluating the concordance of the raters and finding a variation lower than one percent.

Additional Considerations

It was important to recognize that given the unique nature and emergent qualities of co-leadership, data collection could be interpreted as "interviewing the choir"; the sample pool having been drawn from individuals that have experience partnering with co-leaders and/or their organization has accepted the model as valid. It would be very difficult to identify candidates who were not successful to include in the sample. As the request for participation was broadcast across social and professional networks reaching the entire leadership spectrum, there was an opportunity for individuals who did not have success with the model to participate as well. Two of the survey respondents commented that the organization no longer utilized the model or that they would not seek out a co-leadership position in the future. The author took care "to consider and weigh all of the options for follow up on the quantitative data" and draw from same sample for validity so that phase two could accurately build on phase one (Creswell, 2014, p. 225).

Chapter 4

Results

Survey Results

The "Characteristics of Co-Leadership" survey (see Appendix A) consisted of 57 questions in total. Thirteen questions involving such quantitative measures as age, gender, and nature of the organization captured nominal data. A blend of 40 quantitative and qualitative questions employing a Likert-type scale allowed participants to rate their experience with the attributes, benefits, and deficiencies as defined by the literature review. Three open-ended questions asked respondents to offer qualitative feedback regarding their overall experience with the co-leadership model. The complete survey with responses can be referenced in Appendix B.

Nominal data. The nominal data collected by the survey that describes characteristics of respondents and their organizations is presented in Table 2.

Table 2

Nominal Data for 14 Survey Respondents

Descriptors	*N*	%
What is your age?		
30-39	3	21
40-49	7	50
50-59	3	21
60 or older	1	7
What is your gender?		
Female		
Male		
Which term best describes your leadership role?		
Executive Director	6	43
Director	3	21
Manager	3	21
President or Chair of a Board	2	14

Descriptors	N	%
How many years have you been in a leadership role?		
Under 1 year	0	0
2-5 years	5	36
More than 5 years	9	64
About how many years have you been in your current position?		
Less than one year	0	0
At least one year but less than three	8	57
3-5 years	3	21
5 years or more	3	21
Please choose the category that best describes your industry?		
For profit	7	50
Not-for-profit	7	50
Government	0	0
How old is your organization?		
Organization in operation longer than 5 years	11	79
Organization in operation 2-5 years	3	21
Organization in operation 1 year or less	0	0
Roughly how many people do you manage (paid and volunteer employees)?		
1-10	8	57
11-50	5	36
51-200	0	0
201-500	1	7

Attributes. Key attributes used to delineate the structural definition of co-leadership used in this research were captured by the survey in Figure 2:
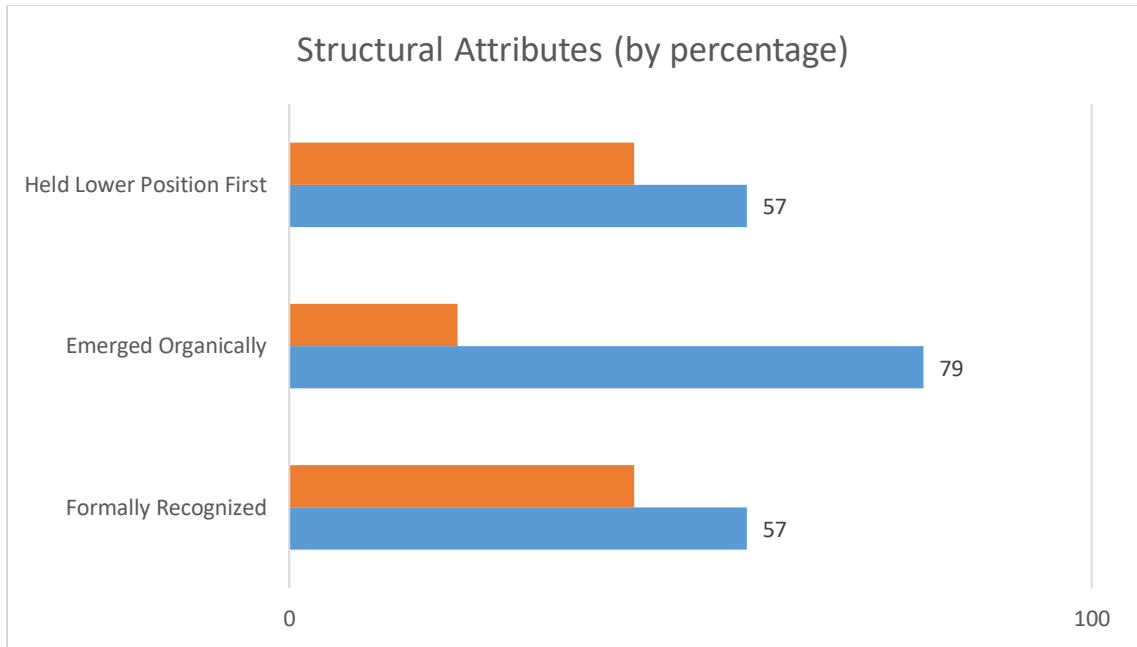
Figure 2

Structural Attribute Results From Survey

When describing the process under which they came into co-leadership, only one respondent reported that they had been recruited and hired for the position at the same time as their partner. Two indicated that they also entered into the roles simultaneously but there was no formal selection process (they chose the co-leadership model as they formed the company). The attributes of the working relationship are presented below (see Table 3):

Table 3

Survey Results Testing Attributes of Working Relationships

Attribute	Survey Question	Range	*M*	s/d
Decision making equivalency	40: Please rate your co-leader on the following traits: Shares the decision making process	1: Doesn't describe at all 5: Very descriptive	4.21	0.699
No scorekeeping	40: Please rate your co-leader on the following traits: Doesn't keep score	1: Doesn't describe at all 5: Very descriptive	4	1.037
	47: I feel a sense of "ownership" for my co-leader's reputation	1: Not at all 5: Nearly always	4.14	0.864
	48: My co-leader's successes are my successes	1: Not at all 5: Extremely so	4.07	0.73
Balanced ego	25: When someone praises my co-leader, it feels like a personal compliment	1: Not at all 5: Extremely so	3.71	1.138
	26: When someone criticizes my co-leader, I take it personally	1: Not at all 5: Extremely so	3.57	1.089
	27: When I talk about my co-leader, I usually say "we" rather than "they"	1: Not at all 5: All of the time	4.07	0.828
	30: How well does your co-leader handle criticism of their work?	1: Not well at all 5: Extremely well	3.5	1.019
	40: Please rate your co-leader on the following traits: Willing to take feedback	1: Doesn't describe at all 5: Very descriptive	3.92	0.997
	40: Please rate your co-leader on the following traits: Willingness to admit mistakes	1: Doesn't describe at all 5: Very descriptive	3.85	0.949
Shared values	33: How hardworking is your co-leader?	1: Not at all hardworking 5: Extremely hardworking	4.5	0.854
	37: In my co-leader, I am surrounded by people who share my values *See Figure 3 for Global Benchmark*	1: Strongly disagree 5: Strongly agree	4.07	1.071
High level of trust	28: How much trust do you have in your co-leader's ability to make the right decision?	1: Not any trust at all 5: A great deal of trust	4.07	0.997
	39: How often does your co-leader fail to meet your expectations?	1: Always 5: Never	4.07	0.474
	49: How comfortable do you feel voicing your disagreement with your co-leader's opinions?	1: Not comfortable at all 5: Extremely comfortable	3.85	0.864

Note. N = 14.

"In my co-leader, I am surrounded by people who shhare my values." by percentage
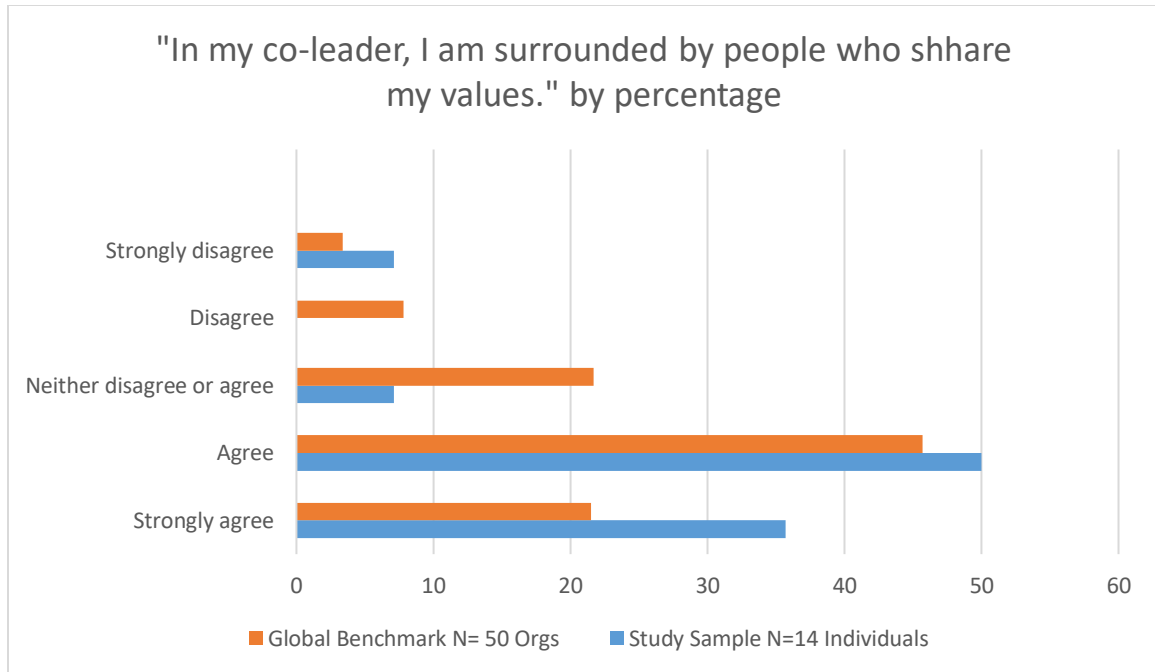
Figure 3

Global Benchmark for Shared Values

Benefits. Specific benefits measured by the study survey were charted in Table 4:

Table 4

Survey Results Testing Benefits of Co-Leadership

Benefit	Survey Question	Range	M	s/d
Checks and balances	34: How much attention to detail does your co-leader have?	1: Not any attention at all 5: A great deal of attention	4	0.960
	35: How well does your co-leader motivate you to do your best work?	1: Not well at all 5: Extremely well	3.9	1.268
	24: How improved is your performance after getting feedback from your co-leader about your work?	1: Not improved at all 5: Extremely improved	3.4	1.089
	49: How comfortable do you feel voicing your disagreement with your co-leader's opinions?	1: Not comfortable at all 5: Extremely comfortable	3.85	0.864
Duality	45: In my co-leadership role my partner and I take on different roles – e.g. good cop vs. bad cop – to get things accomplished	1: Not at all 5: Nearly always	3.4	1.050

32

Table 4 (Continued)

Benefit	Survey Question	Range	M	s/d
Robust decision making	32: How reasonable are the decisions made by my co-leader?	1: Not at all reasonable 5: Extremely reasonable	4	0.615
	36: How creative is your co-leader's work?	1: Not at all creative 5: Extremely creative	3.9	0.997
	40: Please rate your co-leader on the following traits: Creative	1: Doesn't describe at all 5: Very descriptive	4.2	0.892
	51: Do you feel that co-leadership is more effective than the single leadership model in… Making decisions?	1: Never 5: Always	4.1	0.662
Nimble and adaptable	29: How well does your co-leader adjust to changing priorities	1: Not well at all 5: Extremely well	4	0.784
	38: Does your co-leader take too much time to make decisions, too little time, or just about the right amount of time?	1: Much too little time 5: Much too much time	2.9	0.258
	42: My co-leader and I adapt quickly to difficult situations	1: Strongly disagree 5: Strongly agree	4.2	0.801
Opportunity risks	44: My co-leader and I proactively identify future challenges and opportunities	1: Strongly disagree 5: Strongly agree	4.4	0.513
	51: Do you feel that co-leadership is more effective than the single leadership model in…Taking risks?	1: Never 5: Always	4	0.784
More fulfilling	18: I feel completely involved in my work (see Figure 4)	1: Strongly disagree 5: Strongly agree	4.5	0.513
	19: I am satisfied that I have opportunities to apply my talents and expertise (see Figure 4)	1: Strongly disagree 5: Strongly agree	4.7	0.468
	51: Do you feel that co-leadership is more effective than the single leadership model in…Overall job satisfaction?	1: Never 5: Always	4.3	0.854
Better support	16: I am inspired to meet my goals at work (see Figure 4)	1: Strongly disagree 5: Strongly agree	4.4	0.513
	43: My co-leader and I have a good working relationship	1: Strongly disagree 5: Strongly agree	4.5	0.513
Reduced burnout	21: In a typical week, how often do you feel stressed at work?	1: Never 5: Always	3.1	0.949
	51: Do you feel that co-leadership is more effective than the single leadership model in…Taking risks?	1: Never 5: Always	3.5	1.016

Note. $N = 14$.

Measurement of the perceived benefit of *fulfilling and supported work* (Bennis &

Heenan, 1999) co-leadership provides against Global Benchmarks appears in Figure 4.

Figure 4

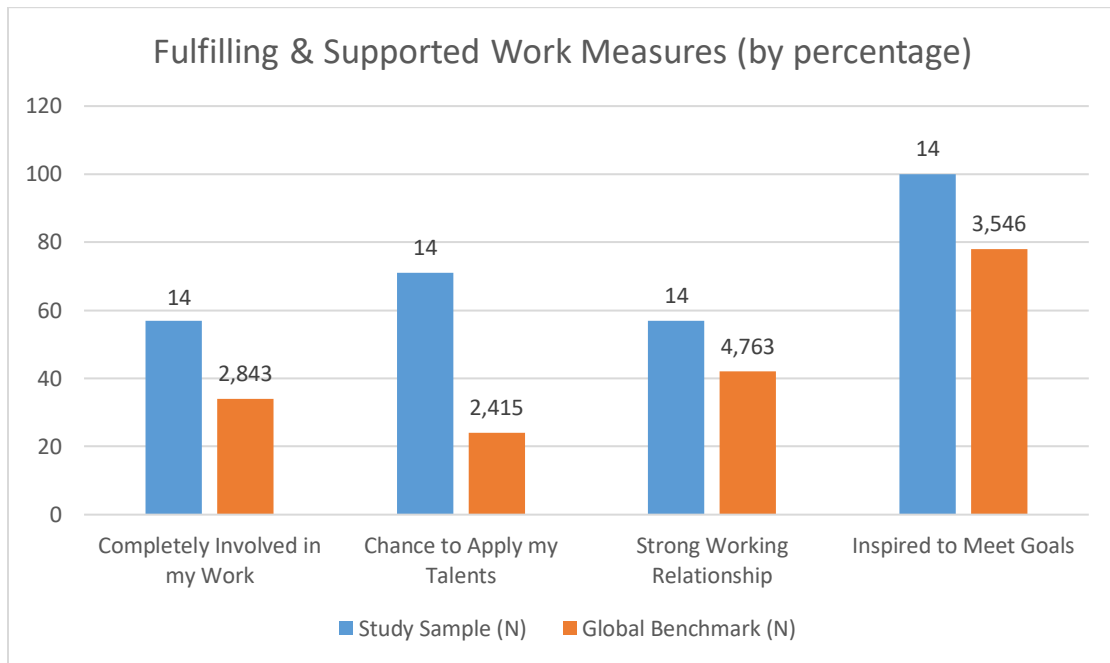***Survey Results and Global Benchmarks for Fulfilling and Supported Work Measures***

Deficiencies. A review of the literature identified two possible deficiencies that

were tested in the survey, *role ambiguity* (Mashburn & Vaught, 1980) and *lack of*

accountability (Troiano, 1999). See Figure 5 for Global Benchmark; charted results for

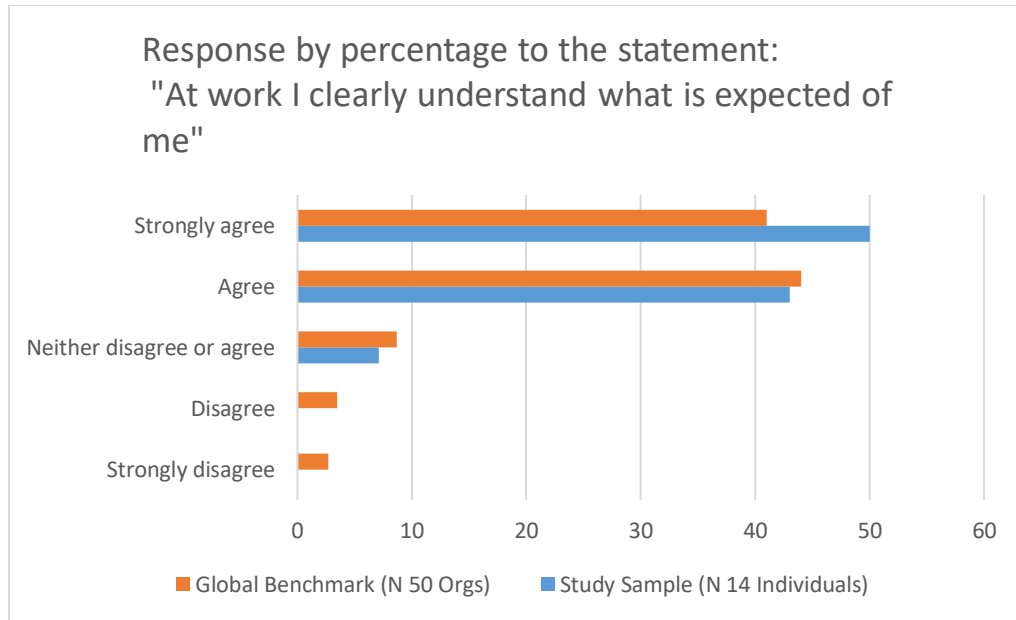deficiencies are also presented (see Table 5).

Figure 5

Survey Results and Global Benchmark for Role Ambiguity

Table 5

Survey Results Testing Deficiencies of Co-Leadership

Deficiency	Survey Question	Range	*M*	s/d	*N*
Role ambiguity	22: At work I clearly understand what is expected of me (see Figure 5)	1: Strongly disagree 5: Strongly agree	4.4	0.646	14
	53: How clear were the expectations that were set for you by the board or CEO?	1: Not clear at all 5: Very clear	2.5	1.286	14
Lack of accountability	35: How well does your co-leader motivate you to do your best work?	1: Not well at all 5: Extremely well	3.9	1.268	14
	24: How improved is your performance after getting feedback from your co-leader about your work?	1: Not improved at all 5: Extremely improved	3.4	1.089	14
	49: How comfortable do you feel voicing your disagreement with your co-leader's opinions?	1: Not comfortable at all 5: Extremely comfortable	3.85	0.864	14
	39: How often does your co-leader fail to meet your expectations?	1: Always 5: Never	4.07	0.474	14

Circumstantial/Tangential and Open-ended Questions

There was a small sampling of survey questions not directly related to the attributes, benefits, and deficiencies as defined in the review of the literature. When asked "Temperament-wise, which do you identify more closely with, cat or dog," 71% chose "I'm a cat – I take it all in then react," while 29% identified with a dog – "I see something and start barking," indicating that a majority of co-leaders may employ a longer period between stimulus and response than those who self-identify with a dog's immediate reaction to input. For a complete list of comments see Appendix C.

Interview Results

Three individuals from the survey pool volunteered to participate in follow-up interviews averaging 45 minutes in duration driven by six seed questions. Transcripts of the interviews were reviewed by a team of three inter-raters who tested for a one degree variance (Tashakkori & Teddlie, 1998) and coded according to the characteristics of co-leadership listed in Table 1. See Table 6 for interview score averages. A summary of the responses and trends are included here:

1. How did your partnership come about? Interviewees one and two served as co-chairs of a non-profit counsel. The co-leader structure was formally recognized but they described the selection process as both formal and informal. Both entered into their roles at the same time. The third interviewee is a formally recognized co-leader of a department within a for-profit organization. The co-leadership model was created during a restructure. The subject was hired for the role after their partner was in place.

2. Were you screened for these roles? The first two interviewees led a nominating committee and after a prolonged period in which no other candidates came

forward they nominated themselves. The screening process was organic. The third interviewee went through a series of interviews for the position and was selected for their experience and compatibility with the co-leader that was already in place.

3. Did you receive any training specific to co-leadership? None of the interviewees indicated that they had received any training or guidance specific to the co-leader model.

4. How is co-leadership received at your organization? By your supervisors/board of directors? Subordinates? The council under which interviewees one and two served maintains a strong commitment to co-leadership and operates from a structure that requires co-chairs for all committees.

5. What are the benefits of this model? What have been some of the challenges? Attributes, benefits, and deficiencies surfaced during the interviews were recorded (see Table 6). Evidence of the presence of increased ethics and a higher rate of opportunity risk taking did not occur during the interviews in levels sufficient for coding. Deficiencies noted during interviews were lack of accountability and role ambiguity, with interviewee three expressing a higher degree experienced within their organization than measured through the survey. Subordinate confusion was also present in interviewee three's organization at a moderate level. Loss of focus and idea shopping were not present in notable quantities for any of the respondents.

6. Any advice for individuals and/or organizations interested in co-leadership? Interviewees one and two both stressed the importance of chemistry in forming a successful partnership. They shared several examples of scenarios in which forced pairings produced unsatisfactory results. Mutual respect was also noted as a key

element which is possibly an outgrowth of shared values and a high level of trust. The importance of scheduling time to connect and align, along with maintaining a high level of communication in order to build a collaborative mindset was noted 15 times over the course of the three interviews.

Table 6

Interview Coding Results

Attribute	Comments N	M	S/D
Board and Supervisor support	10	4.25	0.88
Subordinate support	8	4.66	0.51
Decision-making equivalency	9	4.14	0.37
No scorekeeping	3	4.16	0.76
Balanced egos	10	4.31	0.59
Strengths and weaknesses	16	4.2	0.67
Shared values	20	4.5	0.62
High level of trust	17	4.5	0.65
Benefit			
Checks and balances	15	4.19	0.48
Ethics	1	4	0
Duality	9	4.5	0.53
Decision making	18	4.21	0.89
Opportunity risks	0	0	0
More fulfilling	3	4.33	1.15
Better support	25	4.52	0.73
Deficiency			
Loss of focus	3	3	0
Lack of accountability	5	3.4	0.89
Role ambiguity	29	3.8	0.93
Subordinate confusion	8	3.2	1.30
Idea shopping	3	3.6	2.30

Note. Coding range 1-5 (*5* = highest score validating trait or characteristic).

Emergent Themes

Additional attributes, benefits, deficiencies and themes surfaced during the interviews and are presented in Table 7.

Table 7

Coding Results for Emerging Themes From Interviews

Attributes	Comments *N*	*M*	S/D
Collaborative mindset	4	5	0
Chemistry	9	4.6	0.54
Time to discuss/communication	15	4.1	0.71
Benefits			
Better together	5	4.6	0.54
Succession & transitional mentoring	6	4.5	0.57
Deficiencies & Pitfalls			
Arranged marriages	3	4.6	0.57
Lack of training specific to co-leadership	5	2.2	1.09

Note. Coding range 1-5 (*5* = highest score validating trait or characteristic).

The inter-rater team that completed coding and identifying key quotes for this study

verified the findings contained in this section.

Chapter 5

Summary and Conclusions

Summary

The purpose of this study was to test the attributes, benefits, and deficiencies of co-leadership as described in a review of the literature and to identify additional characteristics that help to legitimize and deepen understanding of the model. Adding definition to the traits and structures that best support co-leadership will allow organizations and practitioners to develop the skills, nurture the cultural values, and encourage wider adoption. This chapter concludes the study by discussing and summarizing the findings by category and interpreting the results. Study limitations, recommendations for future research, and implications are also included in this final chapter.

Discussion

Nominal data informing a discussion of the findings was compiled from the 14 person judgement sample and found that a majority of leaders surveyed fell in the 40-49 age range, which mirrors industry-wide averages for those holding senior management positions. They are not emerging leaders but professionals in leadership positions for more than five years with the same organization who have lived through the rigors of heroic leadership.

Most have been in a co-leadership role less than two years; a slight majority formally recognized by their organizations. This data may point to the resistance this model still faces. Fifty percent of co-leaders surveyed were women, 26% higher than the global average for women in senior leadership roles according Medland (2016), which

may point to gender balance and dynamics as an important ingredient for creating successful partnerships.

Attributes. The interviews served to ground some theories tested in the survey and elaborate on other areas as follows:

Discussion/collaboration/decisions. It was clear from the research conducted in this study that successful partners made decisions equitably and supported each other's choices in public even if they disagreed in private. The importance of building a base of trust and shared values that partners can draw from was captured in this comment:

> I think where the conflict comes in is where you have differing ideas and differing objectives and you go in and stuff happens and you get irritated with the other person because you hadn't talked about it ahead of time.

Working through differences behind the curtain creates a safe space for humble inquiry (Schein, 2013) when working through challenging situations with subordinates and stakeholders.

Interviewees stressed the importance of taking time to achieve alignment through dialogue:

> We spent time together talking about … our individual visions and our collective vision. What did we want to accomplish? What did we want to be different? How do you want to work together? We even talked about how we would do conflict.

Co-leadership, more than single heroic leadership requires time to fully realize the benefits of checks and balances inherent in the model that make for more robust decisions: "Really, being able to sort through what's our united message, what are we going to stand on, what are we going to give on. Then, staying connected." This process "slows things down a bit to make sure risks are worth taking and can be managed" as one

respondent commented, but existing research suggests it encourages more robust decision-making and risk taking than singular leadership produces.

Chemistry. Mutual respect that begins at the forming stage and encourages constructive rather than destructive conflict during the storming phase appeared as a desirable benefit of pairings that achieved values and goal alignment. The ability for co-leaders to enact the prescribed traits of no scorekeeping and balanced egos was linked to the existence of chemistry between partners by the interviewees: "50% of the committee co-chairs didn't work out. I think a lot of it had to do with chemistry. They didn't spend time figuring how they were going to work together. They didn't have shared vision." Shared values in the form of hard work and ethics scored 19 points higher with survey respondents than their global benchmark counterparts and may contribute to good chemistry.

Benefits. The interviews and survey responses served to validate and elaborate on many of the benefits of co-leadership pulled from existing literature and surfaced new ones:

Duality. Checks and balances are inherent in partnerships with good chemistry and complementary strengths and weaknesses. Differences as well as similarities add to the richness of co-leadership. Interviewees reflected on the ways these manifested to improve performance not only of co-leaders but their subordinates: "He took certain committees and I took certain committees to follow up with. We did that based upon our own interests, experience, but also who we thought would resonate better with us. Which style was needed or preferred?"

Differences in style allow for altering approaches to suit the situation and audience: "how you handle conflict. Having differing opinions around what's acceptable and what's not acceptable." Interviewees affirmed survey answers indicating how employees received duality: "It was kind of like we were Mom and Dad and they would, they would play us differently." As noted previously in this study, care must be taken to remain consistent with vision and strategy within a shared set of values in order to achieve the benefits of this characteristic.

Cognitive heterogeneity. Closely related to duality is the quality of cognitive heterogeneity that co-leadership can bring to bear when guiding complex transformation teams:

> We have lots of artists, and even our program managers and stuff, they have an art lead, so someone who actually provides oversight to the actual art to their craft. And they also have a dotted line manager, a secondary manager, that provides kind of leadership and career guidance and how they're doing performance-wise who doesn't give oversight to their art.

As Bhansing et al. (2012) noted this purposeful dissimilarity allows employees to access a wider variety of skills and experience than a single leader can offer.

Better decisions/two heads are better than one. Interviews and survey comments gave detail to this overarching theme in the following quotes: "They have access to different leadership styles. Two brains are better than one. (We) had similar but different visions and when they came together I think it was a really amazing vision." "Two of us were more empathetic to whatever the issue was with somebody than either one might be." "So they get the benefit of ... getting advice from two different leaders, working with two different leaders." It makes sense that two talented individuals bringing contrasting and complementary skills and styles creates a much deeper well of leadership. The

challenge may be to convince organizations that it is worth the investment. Benefits in the form of better support and sustainability may provide the return on investment to justify the cost of retaining two leaders.

Better support. It has been widely published that single leaders experience burnout at a high rate and that this leads to turnover. One of the ways co-leadership provides support a single leader may not have access to within their organization is a sympathetic ear and sounding board: "We just talk about our team and how things are going and challenges or whatever. Talk about each other's employees. …walk-in therapy." Further study measuring quantitate benefits of this aspect may lead to more organizations investing in this model.

Succession/sustainability. A benefit that emerged during the qualitative phase of the research was that of succession planning and sustainability. Key quotes include: "We can see the difference on the board now and we believe it was because of the foundation we created." "Both of us are supporting the other if the other one can't be there." "The reasons might be we want to have complete backup, 100% backup all the time." What some organizations might see as redundancy may actually work in their favor by maintaining consistent and sustainable leadership during times of personal crisis and transition.

Deficiencies. The assumed deficiencies of co-leadership identified in the literature were not supported by this explanatory sequential mixed method study as strongly as most of the attributes and benefits. This may be a result of the judgment sample made up primarily of practitioners who have had a positive experience with co-leadership. There

did surface cautions against role ambiguity and lack of focus from interviewee three and the following structural trait that may limit success:

Arranged marriages. Interviewees seemed to agree with Bennis and others that forced pairings made out of convenience or to satisfy shareholders rarely held together: "Instead of an arranged marriage, it's 'We have to find each other.'" The lack of knowledge on how to recruit and hire the perfect pair may present the single biggest challenge to full inclusion of co-leadership as a legitimate model for organizations seeking to be more adaptive and sustainable.

Consensus on co-leadership. The theme that emerges the strongest from this study is around strength in numbers. That this modern world asks too much of single leaders and the pressure to be all things to all people leads to burnout and bad behavior. Former Northwest Airlines CEO Gary Wilson argued that companies need not one but two at the top to avoid a concentration of power and to provide checks and balances (Wagner & Muller, 2009). In the same study Wagner and Muller (2009) found that individuals working collaboratively with a partner were 42% more likely to remain with their employer their entire career and that those who felt well-teamed were "substantially more engaged at work, generated higher customer scores and better safety, retention, creativity, productivity, and profitability for the business – and a greater level of happiness for themselves." What organization would not want to explore a leadership model with these potential outcomes?

Implications

It may be that in order to develop capabilities for organizations to solve increasingly complex problems that threaten the stability of our global community we need leaders

that share equally the challenges, frustrations, and triumphs of daily governance. As industries become increasingly specialized the conventional wisdom that a single heroic leader will possess all the social, relational, and technical skills required to motivate, maintain, and strategically manage effective and adaptive organizations may be outdated.

Individual leaders experiencing feelings of isolation and burnout may wish to seek partners that can support them in their work. As they collaborate with employees and external stakeholders they might keep an eye out for persons that embody the attributes of co-leadership: shared values, a trusting relationship, complementary strengths and weaknesses, etc... Developing a complete list of everything the organization and the environment asks of them then conducting a personal inventory could reveal gaps which offer opportunities to recruit a partner with complementary skills and strengths. The assumptions explored in this study and supported by research suggest that a willingness to become vulnerable and accept help could lead to a more productive and fulfilling career and life.

Conversely, organizations exposed to these findings may decide that co-leadership is worth pursuing as a management design strategy that supports adaptive and sustainable growth. Research such as this study that serves to legitimize and define the key attributes, benefits, and deficiencies of co-leadership should encourage forward-thinking boards of directors and CEO's to invest in the formal adoption of this model. The hope is that human resource and talent management professionals will work with Organization Development practitioners in developing tools to identify candidates for co-leadership, then train them in the techniques and practices that encourage fruitful and fulfilling partnerships.

Limitations of the Study

The sample pool was too small to firmly ground the theory of co-leadership on a macro level, for instance there was not enough quantitative data to draw conclusions around the idea that co-leadership reduces burnout or reduces turnover across multiple industries. The subjective nature of explanatory sequential mixed method research may limit the findings to primarily qualitative data. This study did not test the validity of the identified benefit criteria in a random or stratified sample, limiting the ability to generalize to a population (Creswell, 2014). Similarly, the nominal data serves to frame responses within the judgment sample but does not allow for definitive statements encompassing the entire leadership spectrum.

Recommendations

Future research. In order to completely ground the theory of co-leaderships benefits and encourage wider adoption a larger study using quantitative means to measure the positive effects on reducing burnout and turnover, coupled with performance measures showing the benefits of this model over conventional leadership is in order. Compensating two executives to fill the same position represents a significant investment that must be justified by returns.

Research confirming or refuting the tacit assumption made by several respondents in this study that co-leadership is better suited to non-profit work would help to clarify and direct development and marketing efforts towards specific industries or organizational structures. Integrating theories such a servant leadership (Greenleaf, 1973) and gender versatility may help to further embed the values of trust, balanced ego, and strengths-based delegation that two bring to the table.

Conclusion

Seventeen years after O'Toole et al. (2002) presented findings endorsing co-leadership at the World Economic Forum in Davos, Switzerland, there is still a stubborn clinging to the single heroic leadership model. Although the benefits to the person and profitability are backed by research (Wagner & Muller, 2009) many are still practicing "under the radar," doing better work together without systematic support. As one respondent remarked "It may be that boards need one throat to choke." With better measurements and published research validating the model it may be that co-leadership gains wider acceptance and is supported with the same resources and rigor as lone wolf leadership.

It is the conclusion of this researcher that together we are better. Decisions are more robust and risks are better vetted and embraced. Leaders are more supported, are challenged to be their best, and find greater satisfaction in their work. Co-leadership might just be the key to developing sustainable organizations that adapt and meet the challenges of this complex and ever-changing world.

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Appendix A: Survey Monkey Characteristics of Co-Leadership Survey

Clickable Link: [Survey Monkey Characteristics of Co-Leadership Survey](#)

Appendix B: Survey Monkey Characteristics of Co-Leadership Survey Responses

Clickable Link: [Survey Monkey Characteristics of Co-Leadership Survey Responses](#)

Appendix C: Open-Ended Survey Question Comments

- "As a volunteer organization, co-leadership has been extremely functional. As this is not our full-time job, having a co-leader helps to share the responsibility, even when other professional responsibilities conflict."

- "We are both peers but co-manage a large team."

- "For the purpose of your research, you should understand that my experience with co-leadership is as a member of the MSOD Alumni Council. I am aware of co-leadership at my former corporate employer but I was not directly involved in such a relationship. Of course, these two environments are very different."

- "We are a 2-person organization. The division of labor is very much based on our particular skills, strengths, and personalities."

- "It's really based on optimizing our individual skills and talents."

- "It grew organically out of necessity. Our work is so complex and chaotic no single leader could effectively coordinate and be the subject matter expert for the organization."

- "We both have unique skills that complement one another. We are different in our life experiences but share similar values."

- "We are co-leading the Talent & OD team, but we each have individual responsibility and management of the two teams that make up this department. So we work together to consider the needs and processes of the broader team, but we still spend the majority of our time individually managing the employees and projects on our respective teams. Based on questions covered in this survey, I'm not sure if we would be considered a pure example of co-leadership."

The concluding open ended question, "Any final thoughts on the benefits, deficits, and attributes of co-leadership?" solicited these comments:

- "The success of the MSOD Alumni Council is largely based on the co-leadership model. The two executive chairs Co-lead the council, and each of five committees are co-lead, providing good support for leadership throughout the council."

- "In theory, shared or co-leadership sounds like it can make sense. You see it in the arts, but in reality in really never works well. Here is a quote that I recently found - To partner you have to have equal intensity and drive. Values and passion synergy. If you don't have these in a partner, you will never be satisfied by their performance level. It is not about 50/50 in task, it is 100% about passion and engagement in the mission and outcomes."

- "Really great for volunteer organizations."

- "It's tough to keep a true balance of co-leadership, and to share equally in the responsibilities and decision making. But if it works, it exponentially increases the ability of your organization in terms of strategy, decision making, and productivity."

- "In a very complex world, it allows for greater focus on individual tasks. This means longer-term projects get more attention than they normally would during work days that are often filled with disruptions."

- "Couldn't wouldn't don't want to do this work without them."

- "I don't have to do this alone. We have high regard and respect for one another. We are flexible and adaptable with regard to setting priorities to take care of each other."

- "I thrive in our structure - where we have individual responsibilities and teams but where we work together to co-lead the broader team under our boss."