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for doctoral leadership students**

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Pepperdine University  
Graduate School of Education and Psychology

UNDERSTANDING THE PERCEIVED VALUE OF GLOBAL LEARNING EXPERIENCES  
FOR DOCTORAL LEADERSHIP STUDENTS

A dissertation submitted in partial satisfaction  
of the requirements for the degree of  
Doctor of Philosophy in Global Leadership and Change

by

Charles A. Gross

October, 2019

Jack McManus, Ph.D. – Dissertation Chairperson

This dissertation, written by

Charles A. Gross

under the guidance of a Faculty Committee and approved by its members, has been submitted to and accepted by the Graduate Faculty in partial fulfillment of the requirements for the degree of

DOCTOR OF PHILOSOPHY

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## VITA

### EDUCATION

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Master of Arts, Education
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### PROFESSIONAL SUMMARY

Before pursuing his doctoral studies, Charles Gross worked in event management. He coordinated conferences in Istanbul and Bucharest for a nonprofit mediation organization, as well as scores of local seminars and workshops. Since turning his attention to research, he has participated in three grant-funded projects, one in the United States and two internationally – with teachers in Namibia and students in Belize. For four years, Charles served as the events liaison for Pepperdine University’s Graduate School of Education and Psychology, reporting to the cultural attaché.

### ACADEMIC SCHOLARSHIPS AND RESEARCH GRANTS

- 2016                      GSEP Endowed Fellows Fund Scholarship
- 2017                      Internal Research Grant Pepperdine University Office of the Provost

## ABSTRACT

Foreign travel occupies a role in the development of global leadership, yet the function of higher education in that process is scarcely understood. This sequential explanatory mixed-methods study explored the perceived value that select doctoral students experienced during from their short-term course-based foreign travel. The first phase of the research included fifty students, while the second used a subset of 12 from the first phase. The students participated in an online quantitative survey, followed by optional interviews where the qualitative data were obtained.

Quantitative and Qualitative research methods were used to analyze the data. The findings were presented in numerical and narrative formats, respectively. The results were consistent with the literature. They also provided additional insights that advance the burgeoning field of global leadership and substantiate more recent trends in the older, more established education abroad arena. The findings suggest specific aspects of academic course-based foreign travel aid in the development of global leadership skills. Participants cited peer-learning, scheduling concerns, overall organization, intercultural contact, theory to practice opportunities, and learning experience applicability as the drivers of value in their academic foreign travel experiences.

The recommendations suggest that course-based foreign travel may benefit from designs that balance participants' exposure to their peers, contact with the local population, and structured academic instruction. Additionally, doctoral students may consider other activities to increase cultural intelligence more broadly; as the results indicate a significant, positive correlation between the value of global learning experiences and cultural intelligence levels.

## Chapter 1: Introduction

In today's globally interconnected environment, new opportunities and challenges demand a new approach to the preparation of leaders. According to Friedman (2007), the self-directed collaboration and competition of individuals and groups shape globalization in the modern era. Forces like innovations in telecommunications and transportation have made it cheaper, easier, and faster to connect people around the globe. Cohen (2010) suggests it is now necessary to think and act both globally and locally simultaneously. Leaders must be cognizant of the "demands from both global and local elements [that] are compelling, while combining an openness to and awareness of diversity across cultures and markets with a willingness and ability to synthesize across this diversity" (p. 5). The acceleration and intensification of international trade have shifted the workplace setting from the local to the global stage. As Oddou and Mendenhall (2012) assert:

New markets, changing governments, fluctuating economies, growing regulations, new competitors, more complex capital sourcing, changing population patterns, disrupted cargo routes, and many other things have created a landscape that is ever changing and increasingly complex...[so that] no single country mindset can understand it. (p. 216)

In response to a deficit of leaders capable of navigating this new reality, many worldwide companies began programs to develop global leaders near the close of the 20th century.

Based on their interviews with 135 human resource managers and senior managers from 75 organizations in public, private and nonprofit sectors, for a RAND study, Bikson, Treverton, Moini, and Lindstrom (2003) predicted a leader deficit across all sectors as a result of globalization. The corporate arena offers several examples of the global leadership shortage. For example, more than half of the respondents in PricewaterhouseCoopers Annual Global CEO

Survey (PwC, 2018) reported that their company's cancellation of strategic initiatives stemmed from a lack of available talent to lead them. In response, the CEOs propose a vision for the future of education in which "governments, businesses, and communities can work together to match talent with opportunity by pioneering new approaches to educating students and training workers" (PwC, 2018, p. 28). That sentiment corresponds thematically with earlier findings from private sector professionals. Elsewhere, human resource scholars and corporate officers identified cross-cultural competency as one of the most capabilities required most in the modern workplace, but paradoxically the one at which they were least effective in developing and assessing (Cumberland, Herd, Alagaraja, & Merrick, 2016; IBM, 2010). Such consistent research results suggest the emergence of substantive change in leadership needs from previous eras.

Over the last three centuries, many have debated the origin, nature, and practice of leadership. From the moment Herbert Spencer (1873) challenged Thomas Carlyle's Great Man Theory in the 1800s, concepts of leadership have evolved in response to the conditions of the day and research findings. Beginning with the belief that innate qualities alone produced leaders seen in the Great Man (Carlyle 1841/1897) and trait theories, perspectives faced challenges nearly as quickly as they emerged. Eventually, claims that leadership was teachable as a set of skills (Katz, 2009) surfaced. Others posited it as a range of styles appropriate for particular situations (e.g., Hersey & Blanchard, 1977), among others. While early leadership questions centered on whether leaders are born or if training and instruction can produce them, the 21<sup>st</sup> century may have found a middle ground: training people with an aptitude for global leadership competence.

While the theory of global leadership shares some similarities with its predecessors, the difference in degree between those areas of commonality is so vast that they constitute different

kinds of work and skills (Bird & J. Osland, 2006; J. Osland, Bird, Mendenhall, & A. Osland, 2006). For example, in an analysis of case studies on global leaders, Bird and Osland (2006) found that the ethical challenges, learning environments, and tension, as well as required competencies, were so different in the global arena that they deserve further research. Through numerous empirical studies, scholars have identified approximately 160 individual global leadership competencies (Bird, 2012), but each researcher advocates a preference for a different number and type. For example, while Caligiuri and Tarique (2012) emphasize the importance of valuing cultural differences, adaptation, and tolerance of ambiguity, Brake (1997) organizes competencies into three categories: Business Acumen, Relationship Management, and Personal Effectiveness.

Moreover, to develop these global competencies, McCall and Hollenbeck (2002) suggest global leaders follow a different developmental path, one with lessons derived from cultural experiences. Additionally, Oddou and Mendenhall (2012)'s review of general leadership development programs find action learning and outdoor experiences, among others, as common components also found in global leadership development. The literature is replete with examples of global leadership development programs. For instance, one of the earliest assessments of Pricewaterhouse Cooper's (PwC) leadership development program—Ulysses—demonstrated the potential of developing some of the competencies and the mindset required for responsible global leadership in corporate managers (Pless, Maak, & Stahl, 2011). Ulysses uses a service-learning approach in which participants travel to a foreign destination and work with locals, for eight weeks, on a project of benefit to the local community.

Similarly, UBS sends its managers on a one-week trip to work full time with nonprofit agencies that dealt with social problems (Mendenhall & Stahl, 2000). The objective of the

development program is to expand participants' perspectives and help them better understand people who were different from them. Unlike PwC and UBS, IBM focuses on providing a variety of global experiences of varying lengths to employees earlier in their careers (White & Rosamilia, 2010). Nevertheless, Gitsham et al. (2008) concluded companies and business schools were inadequately developing global by failing to equip them with knowledge and skills to address context, complexity, and connectedness. In a concurring conclusion, Pless et al. (2011) contend that traditional management education has "failed to prepare students and managers for the leadership challenges and ethical dilemmas faced in an increasingly complex, global, and interconnected world" (p. 237).

Within academia, as Bikson et al. (2003) recommended, higher education institutions now include global leadership in their curriculum. According to Y. Li (2013), "global competence is teachable by providing students with appropriate learning opportunities . . . Educators must be motivated to engage in globalization endeavors both inside and outside the classroom" (p. 138). With a focus on the teaching of global leadership in US colleges and universities, the experimental design in her study found American students capable of increasing their global competence across three dimensions – attitudes, skills, and knowledge, when collaborating virtually with Chinese counterparts. Despite positive findings in the pilot study phase, Y. Li (2013) advocates for further research into other innovative approaches for teaching global leadership in higher education.

In fact, Montgomery and Arensdorf (2012), present short-term study abroad, a growing trend in higher education, as a means for developing students into globally competent leaders. The anecdotal evidence from their university's leadership-focused short-term study abroad opportunity suggests students gain cognitive, attitudinal, and behavioral competencies from

participation. However, when Fine and McNamara (2011) used the Global Perspectives Inventory as the instrument in a pretest/posttest design, they found graduate students participating in a short-term study abroad had significant differences in their gains compared to undergraduates.

However, global leadership development is not the only movement infusing itself within higher education. Institutions are now making it a priority to produce graduates that make a social impact (Ellerman, 2012). The rise of social innovation, which was once considered a buzzword that lacked utility for academic purposes (Pol & Ville, 2009), has come to represent a beneficial component of higher education (Ellerman, 2012; Gamoran, 2018).

Moreover, the integration of social innovation education into higher education curriculum promotes the development of 21<sup>st</sup> century jobs skills (Rivers, Armellini, Maxwell, Allen, & Durkin, 2015). Adam Gamoran (2018) asserts that the future of higher education may hinge on its ability to impact society with more than just its graduates.

Nicholls and Murdock (2012) depict social innovation the cross-sector relations between the ideal form of the public (i.e., the state), business (i.e., private), and civil society. However, Nicholls, Simon, and Gabriel (2015) describe social innovation as a boundary-blurring activity that occurs within the space between any two of the sectors. Despite the growing research interest in social innovation (Agostini, Vieira, Tondolo, & Tondolo 2017; Phillips, Lee, Ghobadian, O'Regan, & James, 2015), its lack of attention to theory inhibits its maturity as a field (Mulgan, 2012). Its theoretical deficiencies stem from the field's development "primarily as a field of practice" (Mulgan, 2012, p. 38). While there is no single theory of social innovation, there is potential to link together a range of theoretical traditions that tangentially inform it, which presents opportunities to make contributions to theory development. Like global

leadership, social innovation is still in search of a consensus definition to guide research and facilitate interdisciplinary communication (Milley, Szijarto, Sevansson, & Cousins, 2018). Similarly, just as global leadership built upon older conceptions of leadership research and literature, social innovation draws on insight and inspiration from technological and business innovation (Pol & Ville, 2009).

### **Problem Statement**

The modern global environment requires new competencies, development processes, and expectations. Conceptions of leadership, therefore, must change, too. According to Osland, Li, and Wang (2014), global leadership as a field of study is growing because of globalization and the increased complexity confronting leaders. This globalized environment is inherently cross-cultural. Leaders in every sector and setting must now think globally and act locally, to be effective (Cohen, 2010). Some (e.g., Bikson et al., 2003; Pless et al., 2011; and Gitsham et al., 2008) suggest a role for higher education within the burgeoning arena of global leadership. Although there is some published research that explores the key components of global leadership, or its development through higher education programs, to date the researcher has been unable to find any published research that shows the value of foreign travel in doctoral coursework towards developing expertise in global leadership. Similarly higher education is presented as the appropriate venue for social innovation education (Gamoran, 2018; Rivers et al., 2015), often drawing on the same learning theories as the medium of instruction in an attempt to offer a comprehensive explanation of what occurs during these learning experiences.

### **Purpose Statement**

The purpose of this study was to examine the value of short-term foreign travel for students in developing expertise in global leadership. Understanding students' perceptions of the



value of education abroad to global leadership can help practitioners and instructors shape training or curricular designs to maximize learning and development. Thus, this study explored the experiences of doctoral students from a short-term study abroad academic course to various international destinations, under the guidance of a leadership doctoral program at a single university. By using established instruments to assess the participants' perceptions, the study also extended the application of those instruments as their respective creators encouraged.

Clarification of the role of course-based foreign travel as a key concept in global leadership education can make a meaningful contribution to advancing the fields of global leadership and social innovation. Doctoral students represent an understudied population in the global leadership literature, yet higher education receives attention as a source for improving global leadership and developing future global leaders. This study aims to determine whether foreign travel has value to students' development of expertise in global leadership. This study contributed to the body of knowledge by helping to clarify the status of a potentially key component of global leadership education. Therefore, this dissertation uses one central research question with related sub-questions to guide the inquiry.

### **Research Questions**

The overarching research question investigated in this study is as follows:

In the opinion of doctoral-level leadership students, what are the aspects of academic course-based foreign travel that contribute to the development of global leadership skills?

The study, more specifically, seeks to investigate the following sub-research questions:

1. What are the differences, if any, between age group, gender, and ethnicity with regard to perceptions of foreign travel's value?

2. What is the relationship between foreign travel destination and perceptions of foreign travel's value?
3. What are the differences, if any, between the Doctor of Education and Doctor of Philosophy students' perceptions?
4. What is the relationship between perceptions of foreign travel's value and cultural intelligence?

### **Theoretical Foundations**

This research builds upon the work of scholars from the fields of education, leadership, as well as cross-cultural theories. It is grounded in Experiential Learning Theory (D. Kolb, 1984), which is related to but distinct from the broader philosophy of experiential education (see Dewey, 1938; Smariga, n.d.), and Cultural intelligence, with its four separate dimensions—Drive, Strategy, Knowledge, and Action. The CQS is considered a statistically valid and reliable measure of cultural intelligence (Van Dyne, Ang, & Koh, 2008; Matsumoto & Hwang, 2013; O'Keefe, Bourgeois, & Davis, 2017). The scales of the instrument are metacognitive, cognitive, motivational, and behavioral CQ (Van Dyne et al., 2008). In examining the intersection of these concepts, an older theory of contact between persons from different groups, namely the Contact theory (Allport, 1954; Pettigrew, 1998) provides a point of departure from which to consider these newer developments.

Ultimately, the evaluations in this study relied on an interpretivist worldview. Interpretivism allows researchers to account for the differences that exist between humans (Willis, 2012) Interpretivist research does not seek to make predictions of find absolute truths; rather it aims to understand the meaning people make of their reality. Given that interpretivism developed in response to the use of positivism, and its objectivist orientation, in social sciences

research, its embrace of a nature of reality that is socially constructed, and draws upon multiple perspectives (Gray, 2014) seems fitting. Understandings of social constructivism draw heavily on the work of Lev Vygotsky (Derry, 2013; Franks, 2014). Although Vygotsky's (1978) work centered on cognitive development in children, his basic premise that people learn through social actions and the meaning the co-construct provides a theory of knowledge for the subject matter of this study on key concepts of global leadership (Klenke, Martin, & Wallace, 2016).

### **Significance of the Study**

The significance of this study primarily lies in its potential contribution to the understanding of the perceived value of short-term foreign travel experience as a course requirement in a doctoral leadership program. As a component of Global Leadership theory, the concept of foreign travel can broaden the discipline and help it expand in relevance to additional sectors of society like previous theories of leadership. As a nascent discipline, global leadership (Osland, 2012) is still early in its development, in need of refinement, theoretical models and a construct definition (Reiche, Bird, Mendenhall, & Osland, 2017). As with any burgeoning field, attempts to create new additions in the body of knowledge could be meaningful. A consensus seems to have formed among researchers, policy actors and the corporate sector on the need for more global leaders.

Further, higher education is presented as a venue for addressing that deficit. Similarly, many scholars have begun to study the increasing use of the short-term study abroad trend for the development of global leadership (M. Li, Mobley, & Kelly, 2013; Montgomery & Arensdorf, 2012; Soria & Troisi, 2014). However, there is scant research available concerning how students perceive the learning experiences.

This study can help clarify the perceived value of foreign travel experience as a Key Concept in Global Leadership, as well as the role of short-term study abroad in leadership education. It may provide researchers with concepts to explore in future studies. The findings in the dissertation could help instructional designers in both higher education and corporations create or support courses that better prepare participants to develop global leadership. In either setting, a better understanding of how individuals perceive a learning experience will benefit instructors and students. This study contributes to efforts to build a vital area of understanding in how to immerse students in global experiences that extend how they work, learn, and live in the modern world. Exploring students' global leadership development via short-term study abroad strengthens the research–practice nexus.

**Need for research.** The outcomes of this study may have implications for researchers and practitioners in the fields of education, leadership, or cross-cultural competence, as well as training and development. The study provided an additional opportunity to test the Cultural Intelligence Scale (CQS). Although it has more validity in some areas than other intercultural competence instruments (Matsumoto & Hwang, 2013), its developers continue to encourage other researchers to use the CQS to advance understanding and of its potential. The results from this study may lead to future longitudinal studies. By identifying the key concepts and underlying theoretical frameworks for doctoral students' curriculum in this one university, instructors will be able to make adjustments and improvements to course delivery. Results of this study may also add to the body of knowledge on the still growing field of global leadership. Finally, the research may assist students who are interested in capturing more value from their learning experiences.

## Scope of the Study

In describing the perceptions of learning global leadership through a short-term study abroad course, the researcher analyzed transcripts of interviews that followed a protocol designed in consultation with the committee chair for doctoral students who have already completed the international travel course in their structured degree program. The researcher conducted semi-structured interviews with research participants and generated several iterations of the concept mapping during data analysis. Completion of the analysis occurred during the summer and spring of 2019. However, the next round of travelers had not yet departed and could not participate in the study.

**University objective.** The Pepperdine learning experience requires doctoral students to travel to an international location for seven to 10 days to discuss economic and policy issues with local and global leaders across a range of sectors in the host country, to prepare them to lead on the global stage. The “experiential perspective on alternative economic and policy approaches [students gain] relevant to their academic and professional interests” (p. 133) will enable them to fulfill course learning objectives and activities. Expectations for students include Identifying the cultural patterns and trends in the host country as well as understanding how institutions, industries, and systems operate so that they can make comparisons to the United States. Students will demonstrate their learning through means as diverse as written reflections and direct engagement with the population of the host country (Pepperdine University, 2015).

## Definition of Key Terms

The investigation uses the following definitions:

- *Global leadership:* A processes and actions through which an individual influences a range of internal and external constituents from multiple national cultures and

jurisdictions in a context characterized by significant levels of task and relationship complexity (Reiche, Bird, Mendenhall & Osland, 2017).

- *Global Leadership competencies*: According to Jokinen (2005), they are the “qualities that enable individuals to perform their job outside their own national as well as organizational culture, no matter what their educational or ethnic background is, what functional area their job description represents, or what organization they come from” ( p. 201).
- *Experiential Education*: Experiential education is a philosophy that informs many methodologies, in which educators purposefully engage with learners in direct experience and focused reflection in order to increase knowledge, develop skills, clarify values, and develop people's capacity to contribute to their communities (Smariga, n.d.).
- *Short-term study abroad*: travel to foreign destinations for educational purposes that last several days or weeks but less than a traditional 15-week academic term. Sachau, Basher, and Fee (2010) identify three short-term study abroad program modes, namely summer abroad, the study tour, and the service-learning trip. However, other terms from the literature include international education, immersion programs, and travel courses. Despite the different labels, the defining characteristics are the trips’ brevity, purpose, and organizer – a university for its students.
- *Cultural Intelligence*: a person’s capability to function effectively in situations characterized by cultural diversity (Earley & Ang, 2003; Earley & Mosakowski, 2004).
- *Social Innovation*: Mulgan, Tucker, Ali, and Sanders. (2007) made one of the earliest efforts to propose a modern definition of social innovation as new ideas that work in meeting social goals. Within the education context, Ellerman (2012) focuses on the

development of new ideas and approaches, outside of the traditional curriculum, to address social problems (Ellerman, 2012).

- *Perceived Value*: for this study value is defined as a combination of relevance and utility.

### **Assumptions**

This study rests on several assumptions. First, the premise of the study will be inviting to potential participants. Additionally, the researcher assumes that participants will be open and honest with the data they provide. Similarly, there is a presumption that the research participants, even if open and honest, have useful data to share with the researcher that is pertinent to the research questions. Finally, this study assumes that academic course-based travel to another country will not inherently lead to a desire to live or work there in the future. The study presumes, based on the literature (Moodian, 2008), travel can increase or decrease affinity for a given country.

### **Limitations**

The design of this study imposed several limitations on its execution and results. Some limitations were more general and stemmed from the overall approach, while others are more specific to the topic and chosen methodology. A first step in mitigating these limitations was a clear declaration of their existence.

This investigation occurred in a new incarnation of a course that the researcher previously completed as a student. Moreover, the researcher is an alumnus and employee of the university. Additionally, since current professor and program director leads the international learning experience, some subjects may provide interview responses they believe the faculty would view favorably. Even without fear of reprisal or obsequious aims, the students' responses could still reflect what they believe the proper answer should be rather than their actual

memories or perspectives. By focusing on the learning process rather than satisfaction or specific content knowledge, the aim is to reduce any potential bias and anxiety. In the interview sessions, hesitation about answering the questions truthfully may arise if students are worried about confidentiality or anonymity.

The scope and research approach of this dissertation precludes generalization of the findings. Application of the results only applies to the sample studied. Although participants may not have traveled to the same destination, they enrolled in the same course that produces the sample. However, when evaluating the results, generalizations about the entire university's population of doctoral leadership students should be avoided.

Additionally, leadership and study abroad contain many elements and nuance. As their expansive bodies of literature suggest, each is complicated enough on its own. Lastly, this study utilizes a semi-structured interview protocol created by the researcher. Despite these limitations, the investigation remains viable as they can be mitigated through the research design and analytical procedures, while preserving explores new theoretical terrain.

### **Organization of the Study**

The present study follows the five-chapter format. The first chapter introduces the research topic, states both the problem and purpose in ways that reveal the study's significance. Chapter 2 presents a review of the literature on study abroad and global leadership. Beginning in earnest with the late 19<sup>th</sup> century, with allusions to earlier eras, the history of educational travel and the evolution of leadership theory provide insight and context to contemporary developments. Experiential learning forms the conceptual bridge between the two domain areas. The final section of the literature review examined the intersection of short-term study abroad and global leadership before concluding with the identification of a major gap in the literature.



Chapter 3 details the study's research design and methodology. It includes an explication of both the conceptual and theoretical frameworks. Procedural steps are outlined for the design of a valid and reliable survey and interview protocol, as well as the use of those instruments with research participants. A description of the analysis process for the data it generates will also reside in chapter three. However, chapter four will describe the results of the study. Ultimately, chapter 5 summarizes the conclusions of the study and presents the researcher's recommendations for future research.

### **Summary**

The last two decades of globalization have increased international interdependence and interconnectedness, which gave rise to the need for new skills and range of experiences to unprecedented levels in the corporate sector; however, a similar change is also occurring in the field of education. Nonetheless, the intersection and potential synergy of these developments remain under-studied. The evolving makeup of study abroad participation and the global economic ecosystem places the two fields on an inevitable collision course. As more students take short-term trips abroad, the utility of such experiences for development purposes in the educational, occupational, and personal arenas only gains in significance. Thus, this study aims to explore cases in which global leadership and study abroad intersect to answer questions vital to decision-makers in education, social, and corporate institutions as well as beginning to bridge the gap in the body of knowledge.

This first chapter introduced the research topic, stated both the problem and purpose in ways that reveal the study's significance, which is illuminated through subsequent chapters. Next, Chapter 2 presents a review of the relevant literature. The final section of the literature review will examine the intersecting domains; before concluding with the identification of gaps

in the literature. Then, Chapter 3 details the study's research design and methodology, which includes elaboration on both the conceptual and theoretical frameworks. Based on those frameworks, steps are outlined for the design and use of both a survey instrument and interview protocol. A description of the analysis process for the data they yield will also reside in chapter 3. However, Chapter 4 will describe the results of the data analysis. Ultimately, Chapter 5 discusses the conclusions of the study and presents the researcher's recommendations for future research and practice.

## **Chapter 2: Literature Review**

Thomas Merton once remarked, “The least of the work of learning is done in the classroom” (Merton, 1979, p. 13). This chapter aims to review the relevant literature on concepts, theories, and studies pertinent to this dissertation. The chapter opens with an overview of the evolution of leadership theory. Given the study’s purpose of exploring the theoretical underpinnings, and investigating potential components of global leadership, the chapter presents the models and frameworks that rise from the global leadership literature on topics such as intergroup contact, cultural intelligence, social innovation, and various methodologies that derive from the philosophy of experiential education. In light of the nexus theory and research at which this operates, the chapter concludes with a discussion of emerging trends in need of the key concepts under investigation here. These elements combine to form a foundation for the theoretical framework guiding this study.

### **Leadership Theory**

Over the past three centuries, the concept of leadership has evolved on a steady, if uneven, trajectory. From the moment Herbert Spencer challenged Thomas Carlyle’s Great Man Theory, many have debated the origin, nature, and practice of leadership. Early questions centered on whether leaders are born or if training and instruction can produce them. As is often the case, the answer is probably somewhere in the middle. Nevertheless, in the 19<sup>th</sup> century, one of the first leadership theories to emerge was Carlyle’s Great Man theory. As the theory’s name suggests, males were the focus of this stream of research hence, the homogenous composition of the figures presented in his work (e.g., William Shakespeare, Martin Luther, and Napoleon, among others). Carlyle contended that innate nature of these men allowed them to shape moments in time through their traits. “The History of the World [he said]...was but the biography

of Great Men” (Carlyle, 1841/1897, p. 23). From Carlyle’s perspective, leadership cannot be developed; rather, it is a trait that one either possesses or lacks. For Carlyle, these innate leadership traits lead to specific consistent actions irrespective of contexts. Trait theory represents the first modern theory of leadership, and despite challenges and critiques from scholars that weakened its influence, it continues to emerge in the research literature (Shriberg & Shriberg, 2011; Dugan, 2017). Herbert Spencer (1873) shared a similar line of critique against the Great Man Theory, suggesting that the men did not shape the societies in which they lived as much as they were byproducts of developments and conditions into which they were born. Stogdill may have launched the first notable critique of Carlyle, but did not disagree with the significance of traits in determining leadership effectiveness. He merely saw situation and environment as equally important factors (Dugan, 2017). However, the contemporary revival [of trait theory] is [in part] a function of new statistical approaches that allow for the reinterpretation of previous studies in more complex ways, challenging past critiques” (Dugan, 2017, p. 98).

**20<sup>th</sup> century.** As an outgrowth of the research on the Great Man theory, the trait approach to leadership was one of the most enduring theories of the 20<sup>th</sup> century (Northouse, 2009). These theorists and studies focused on identifying the traits or qualities that made leaders effective. In a review of the traits literature published from 1904–1947, Stogdill (1948) demonstrates how eight specific traits can differentiate a leader from other group members, but not predict effectiveness—seemingly minimizing the distinctions between effective leaders, non-effective leaders, and non-leaders (alertness, initiative, insight, persistence, responsibility, self-confidence, and sociability). According to Northouse (2009), the 1948 study also revealed, “the traits that leaders possess must be relevant to situations in which the leader is functioning” (p. 16). The introduction of attention to leadership behaviors and situations was foreshadowing of future

developments. Stogdill later revisited the traits research in 1974, which resulted in the addition of four more leadership traits (influence, tolerance, achievement, and cooperativeness) and two deletions (intelligence and alertness).

Despite the prevalence of trait-based leadership perspectives among researchers in the first few decades of the 20<sup>th</sup> century, the results of their studies inconsistently identified the traits separating leaders from nonleaders (Zaccaro, 2007; Colbert, Judge, Choi, & Wang, 2012). For example, in 1935 Professor Tead of Columbia University “listed physical and nervous energy, a sense of purpose and direction, enthusiasm, friendliness and affection, integrity, technical mastery, decisiveness, intelligence, teaching skill, and faith as necessary qualities in leaders” (Johns & Moser, 1989, p. 16). Conversely, Zaccaro (2007) cites Charles Bird’s 1940 summary of leader traits as accuracy in work, knowledge of human nature, and moral habits. Moreover, Stogdill’s (1948) list includes decisiveness in judgment, speech fluency, interpersonal skills, and administrative abilities as stable leader qualities to counter the notion of leader traits as purely immutable and heritable properties (Zaccaro, 2007). The inability to define a definitive list of essential traits is a chief criticism of the trait theory (Northouse, 2009), as it transitioned from phases emphasizing the great man, situations and a scientific revival (Dugan, 2017).

The findings in studies over the past 100 years of research, the traits featured most prominently, were physiological (e.g., speech, masculinity), social or intellectual (Northouse, 2009). The theory’s popularity has waned considerably since its inception. Nevertheless, growth in the research base contends that argued for traits as significant precursors of leadership effectiveness (Zaccaro, 2007) the by theory, highlights trait theory’s revival after the behaviorists eclipsed it decades earlier (Dugan, 2017).

The basic premise of behavioral theories is that leaders' actions are more significant than their genetics and predispositions. Two seminal studies in the behavioral approach to leadership come from the University of Michigan and Ohio State University (Northouse, 2009). By administering the Leader Behavior Description Questionnaire to a diverse sample, ranging from private sector professionals to military members as well as college students and administrators, the researchers were able to conclude that there were two broad categories of leaders – those oriented towards tasks and those oriented towards people. The categories received labels of initiating structure and consideration (Judge, Piccolo & Ilies, 2004). While the latter refers to leaders' regard for their followers' personal and professional well-being, initiating structures concerns the operationalization of tasks. In their quest to identify common leadership behaviors, the Ohio State researchers helped accelerate the move away from traits to something that can be conditioned-in or taught-to individuals.

Subsequently, extending the research at Ohio State, The leadership studies from the University of Michigan corroborated the Ohio State findings, concerning the two common behaviors of effective leaders – task or people orientation (Stogdill & Shartle, 1956). However, under the direction of Rensis Likert, the Michigan researchers introduced a group dynamic into the assessment of leadership (Likert, 1961). Later, Likert (1967), using the data from the University of Michigan studies, introduced his Four Systems of Management to advance the notion of the efficacy of participative leadership behaviors for increasing subordinates' engagement and motivation.

Likert's model contains four styles, moving sequentially from Exploitative Authoritative to Participative Democratic. Seven variables provided a basis for comparison among the four styles. In a system using the *exploitative authoritative* style, completion of tasks is the sole

objective; hence, subordinates receive directives from superiors without involvement in the decision-making process or institutional trust. Similarly, in the *benevolent authoritative* system, supervisors retain all responsibility and authority but use rewards instead of fear to motivate subordinates. Conversely, a system in which decision-making resides within the higher organizational ranks but communication flows in both directions and rewards commensurate with one's level of involvement in decision-making is *consultative*. Finally, *participative* systems subordinates have the trust of their supervisors and become active partners in making decisions; thus, teamwork and involvement replace rewards as motivating factors. Likert's research eventually inspired the Leadership Grid of Robert Blake and Jane Mouton. Their grid (Blake, Mouton, & Bidwell, 1962) plots five behavioral leadership styles along axes representing people concern and task concern.

Following the behaviorists' dominance of the leadership research landscape in the 1940s and 1950s, a move towards learning and development continued. Three leadership theories that emphasize the acquisition or application of different skills or styles of leadership as conditions warrant exemplify the transition away from the behaviorists. First, Katz (2009) presents technical, human, and conceptual skills as the abilities necessary for success. Although the skills are likely interrelated, they can be developed independently, since skill is the translation of knowledge to action. If a leader lacks strength in one area, Katz cites in psychology and physiology research as the basis for his belief that practice and training can improve leadership performance and effectiveness. The idea that certain situations require more fluidity in approach from the leader to address different areas carries over to other theories as well.

A range of theories that accounted for a leaders' behavioral style as well as the specific situation they faced became associated with the contingency theories movement. In the 1960s

Fred Fiedler (1967) introduced his contingency theory, which unlike its name implies is not a backup plan in which leaders change their style based on the situation they face; rather since no single leadership style is universally best, it aims to align leaders with the appropriate situation for their style. In short, leadership effectiveness is contingent upon the leader-situation match (Northouse, 2009). Fiedler (1967) was among the first to formulate a theory around a combination of the leaders' style, followers' needs, and situational factors. He also proposed criteria for matching leaders to the right situation. The relationship between the leader and members of the organization must operate from a position of trust and respect. Additionally, the degree to which followers' goals and procedures have clarity helps create favorable conditions. Finally, the leader needs the power to reward or followers.

The correct combination of the favorability criteria will promote leadership effectiveness, for a leader's given style. According to Fiedler (1967); however, leaders with high task orientation are successful across a range of situations, whereas those more inclined towards a people orientation find more success in situations that avoid either extreme positivity of extreme negativity. Ultimately, Fiedler's contingency theory harkens back to elements of trait and behavioral theory, while also illuminating the importance of situations and propelling the theory of leadership forward.

Despite differences among its proponents, the foundational principle in situational leadership holds that no single leadership style is always best. However, a confluence of "shifting claims, altered premises, a split between the creators' approaches to and uses of the concept, and the equivalent of academic throw downs challenging the legitimacy of the concept" (Dugan, 2017, p. 130) have complicated the development of situational leadership. Nevertheless, the Hersey and Blanchard model (Hersey, 1969; Hersey & Blanchard, 1977) presents a guide for



leaders' effectiveness that rests on their ability to adapt their style based on the needs of their followers and the task behavior. Although situational leadership lacks the level of empirical support of other leadership theories, it draws theoretical support from Koman's 1966 proposition of a curvilinear relationship between task and relationship behavior, and leadership effectiveness (Dugan, 2017). Such a nonlinear relationship would mean increases in both task and relationship might not necessarily yield more effective leadership. The resulting grid has four quadrants that correspond to four styles leaders can draw upon in a given situation and reflect followers' needs:

- S1: Directing entails highly prescriptive directions from leaders to followers with details on what required tasks as well as how to complete them and monitoring.
- S2: Coaching involves the coupling of highly prescriptive directions with higher levels of support so that the follower becomes a part of decision-making.
- S3: Supporting reflects a shift in the leader's attention from providing directions about the task to encourage followers' use of the skills and knowledge on tasks.
- S4: Delegating shifts more responsibility to the follower, while the leader monitors and provides opportunities for growth.

In a move away from leader-centric perspectives that focused on qualities and situational behaviors, the latter decades of the 20<sup>th</sup> century introduced a set of theories that place the motivation of followers in a central role. Bass (1990) illuminated the distinction between transactional and transformational leadership. On the one hand, transactional leaders rely on a system of punishment and rewards to motivate followers. On the other hand, "transformational leadership is the process whereby a person engages with others and creates a connection that raises the level of motivation and morality in both the leader and follower" (Northouse, 2009, p. 174). Thus it seems a critical difference between transactional and transformational leadership is

an emphasis either extrinsic or intrinsic motivation of followers. Both models seek to motivate followers. However, each draws influence from a different set of theoretical perspectives. There are connections between transactional leadership and the behavioral theories. Just as transformational leadership finds inspiration in some aspects of charismatic leadership (Bass, 1990; Bass & Riggio, 2005).

From the work of Bass and Avolio on transformational leadership, Northouse (2009) identifies idealized influence, inspirational motivation, intellectual stimulation, and individualized consideration, collectively known as the 4I's, as the effects that allow transformational leadership to be effective. While idealized influence relies on the leader's ability to motivate followers by actions that inspire emulation from followers, Inspirational motivation draws on the transformation leader's ability inspire through communication of expectations. This balance of words and deeds stand in stark contrast to the transactional leader, who exchanges rewards for follower effort (Bass, 1990). Unlike the transactional leader who monitors followers for deviation from the norms, the transactional leader actively encourages creativity and innovation through intellectual stimulation. Finally, individualized consideration is the means by which transformational leaders the process of providing a supportive climate in which leaders demonstrate their concerns for the listen for their followers' interests (Johns & Moser, 1989). The differences between transactional and transformational leadership notwithstanding, they signal a shift to a greater emphasis on followers than earlier theories.

While transactional leadership embodied the success of the Industrial Revolution (Rosch & Anthony, 2012), transformational leadership highlighted the shift to a greater emphasis on the relationships and interactions leaders characteristic of the information age (Northouse, 2009). However, two other perspectives stand out as 21<sup>st</sup> century paragons of the global era.

**21<sup>st</sup> century.** The Global Leadership and Organizational Behavior Effectiveness Research Project (GLOBE) sought to investigate the relationship between societal culture, societal effectiveness and organizational leadership around the world. The research team included 170 co-investigators based in the 62 examined cultures. Given their decision to sample business professionals like CEOs and middle managers, it was necessary to rely mostly on societies with private enterprise. The researchers assigned the 62 societies to one of 10 clusters (House et al., 2004). Not all clusters aligned with Hofstede's depiction of cultural dimensions is societies around the world. Thousands of participants completed questionnaires regarding leader attributes and behaviors. In other phases of the project, participants provided data on national-level societal culture through pilot studies using various approaches (Globe Project, n.d.). What distinguishes GLOBE from its contemporaries in the leadership in the body of knowledge is its combination of cultural dimensions research and implicit leadership theory (Javidan, Dorfman, Sully de Luque, & House, 2006). Although GLOBE uses more cultural dimensions than its source of inspiration, Hofstede (1984, 1991), when combined implicit leadership theory (ILT), they produce a unique result. An outcome of the international research effort was the idea of culturally endorsed leadership theory (CLT), which presents six distinctive universal styles. The GLOBE Study (Javidan et al., 2006) highlighted the also demonstrated the incongruities between traditional leadership theories and the practice of leadership around the world on several cultural dimensions. GLOBE (House et al., 2004; Globe Project, n.d.) identified six dimensions of global leadership that constitute their culturally endorsed theory of leadership theory CLT):

- Charismatic/Value-Based (CVB) leadership includes six global leader behaviors or attributes: (a) visionary, (b) inspirational, (c) self-sacrifice, (d) integrity, (e) decisive, and (f) performance oriented. CVB leaders deftly use the conviction from their firmly

held beliefs to motivate and inspire their followers to meet performance standards.

This type of leader will “articulate and emphasize end-values such as dignity, peace, order, beauty and freedom” (House, Hanges, Dorfman, & Gupta, 2004, p. 673).

- Team-Oriented leadership (TOL) includes five global leader behaviors or attributes: (a) collaborative team orientation, (b) team integrator, (c) diplomatic, (d) reversed scored malevolence, and (e) administrative competence. The TOL dimension “emphasizes effective team building and implementation of a common purpose or goal among team members” (p. 675).
- Participative leadership is composed of just two reversed-scored measures of global leader behaviors or attributes: (a) non-participative and (b) autocratic. This type of leadership typically features the inclusion of team members in the decision making and implementation processes. Conceptually this culturally endorsed leadership theory harkens back to Likert’s (1967) assertion from an earlier era of leadership theory that participative behaviors yield the highest engagement and motivation of followers.
- A Humane-Oriented leadership (HOL) includes two global leader behaviors or attributes: (a) modesty and (b) humane orientation. The HOL dimension refers to leadership that is supportive and considerate, while also reflecting compassion and generosity (House et al, 2004). Interestingly, not one of the 10 country clusters in the GLOBE study rated the humane-orientation as the most effective leadership style (Globe Project, n.d.).
- Autonomous leadership is measured by a lone subscale of leader behaviors and attributes. It reflects leaders that are individualistic and independent, who do not rely

on others. According to House et al. (2004), prior to the GLOBE study, this leadership dimension had not appeared in the literature. However, it shares some resonance with Thomas Carlyle's (1841/1897) Great Man Theory, and its central proposition that through the sheer force of will uniquely endowed leaders shape society.

- Self-Protective leadership includes five global leader behaviors or attributes: (a) self-centered, (b) status conscious, (c) conflict inducer, (d) face saver, and (e) procedural. The *self-protective leader* will focus on encouraging the safety and security of an individual group (Globe Project, n.d.). Perhaps unsurprisingly self-protective leadership was the least effective style in the GLOBE study, with just under a quarter of the participating countries favoring it (House et al., 2004).

Similarly, Perkins (2009) suggests that six characteristics of traditional leadership theories give them distinctive Western premises that limit their utility in other parts of the world. The premises relate to a leader-centric focus, male dominance, universal traits, task-relationship balance, emphasis quantifiable performance and outcomes, and individualistic orientation. Of the leadership theories previously referenced, from before the 21<sup>st</sup> century, all are associated with male researchers and scholars from the West, particularly from America. With the rise of globalization, and the flattening of the world (Friedman, 2007) bringing people from around the globe in ever-increasing contact, understanding cultural differences and negotiating cross-cultural interactions have a role in leadership. However, the influence of the Western leadership perspective also affects aspects of global leadership theory (Holt & Seki, 2012).

## **Global Leadership**

The nascent discipline of global leadership builds on the foundation of its predecessors but is distinct. Although previous eras of globalization increased interconnectedness through the actions of and corporations, in the twenty-first century the self-directed collaboration and competition of individuals and groups, shape the global environment (Friedman, 2007). Forces like innovations in telecommunications and transportation have made it cheaper, easier and faster to connect people around the globe. Cohen (2010) suggests it is now necessary to think and act both globally and locally simultaneously. Leaders must be cognizant of the “demands from both global and local elements [that] are compelling, while combining an openness to and awareness of diversity across cultures and markets with a willingness and ability to synthesize across this diversity” (p. 5). As Oddou and Mendenhall (2012) assert:

New markets, changing governments, fluctuating economies, growing regulations, new competitors, more complex capital sourcing, changing population patterns, disrupted cargo routes, and many other things have created a landscape that is ever changing and increasingly complex...[so that] no single country mindset can understand it. (p. 216)

While domestic and global leadership share some similarities, the nature of global leaders' work is substantively and qualitatively distinct. The difference in degree between those areas of commonality is so vast that they become something different (J. Osland et al., 2006; Bird & Osland, 2006). However, the Western orientation of earlier concepts of leadership (Perkins, 2009) presents a reason for redefining leadership in this era of globalization.

**Defining global leadership.** The emergence of global leadership in recent decades mainly flows from the business literature. Like leadership theory from previous eras, reaching a consensus on a definition has proven elusive, despite several attempts from

researchers. Jokinen (2005) made one of the earliest efforts to develop a construct definition of global leadership. To develop an integrative framework of global leadership competencies, Jokinen (2005) reviewed and discussed the terminology used in the international global leadership literature. Ultimately concluding that:

The research on global leadership competencies is characterized by missing consensus on concise definitions and classification of such fundamental terms as “global”, “management”, “leadership”, and “competency”. The term “global” is frequently used interchangeably with the terms “international”, “multinational” and “transnational” although distinction has been made between these terms. (Jokinen, 2005, p. 201)

Subsequently, Mendenhall, Reiche, Bird, and Osland (2012) defined the *global* component of global leadership as a multidimensional construct. Like Jokinen (2005), the researchers also reviewed the definitions of global leadership in the literature at the time, once again finding inconsistencies, as well as a lack of specificity and rigor. However, Mendenhall et al. (2012) conclude that the lack of a construct definition for global leadership hampers the discipline’s progress, as results between studies cannot be compared or inform future research, thus slowing theory development and empirical research. They present contextual, relational, and spatial-temporal dimensions of global concept in the construct.

- The contextual dimension relates to the complexity of the global environment. In fact, Lane, Maznevski, Mendenhall, and McNett (2004) suggest use of the term globalization is just an attempt to describe what increased complexity. Moreover, they posit three factors that combine to create complexity. First, multiplicity is the increased number and variety of entities leaders must engage on the global stage. Second, the interconnectedness of capital, people, and processes are a factor in

complexity. Finally, the idea of flux or the state of constant change in the global arena multiplies the degree of complexity. Both tasks and relationships are complex in the global milieu.

- The relational dimension pertains to the number and types of channels through which information must travel for leaders to operate globally. Mendenhall et al. (2012) label this dimension flow and divide it into two categories – richness and quantity. Flow derives from literature on boundary spanning (Beechler, Levy, Taylor, & Boyacigiller, 2004). Beechler et al. (2004) define boundary spanning as “linkages that integrate and coordinate across organizational boundaries” (p. 122).
- The spatial-temporal dimension may concern the most obvious issue given the topic. Presence as a dimension of global leadership contains two elements. First, the degree to which an individual must physically move across geographical, cultural, and national boundaries, rather than merely communicate across them with telecommunications. Second, the amount of actual physical relocation a person has to engage in to interact with stakeholders situated around the globe.

In some instances employees of a corporation must move to, live and work in a foreign country for an extended period. These expatriates on foreign assignment provided much attention in the early global leadership research (Mendenhall et al., 2012; Osland, 2012). However, some note that global leadership does not always require one’s physical travel across national borders. It is possible to “have international exposure and a multicultural experience just by working on a project which involves people from other countries, or involves people of different companies” (Stahl & Brannen, 2013, p. 500).



Ultimately, based on the three dimensions of the global concept, Mendenhall et al. (2012) proposed a definition of global leadership to guide and serve other researchers. They viewed global leadership as the process of influencing others to adopt a shared vision through structures and methods that facilitate positive change while fostering individual and collective growth in a context characterized by significant levels of complexity, flow, and presence. Through a refinement process, Reiche, Bird, Mendenhall, and Osland (2017) eventually come to define global leadership as the processes and actions through which an individual influences a range of internal and external constituents from multiple national cultures and jurisdictions in a context characterized by significant levels of task and relationship complexity.

In addition to the theoretical and research-driven concerns raised by Mendenhall et al. (2012), Holt and Seki (2012) highlight the practical importance of having a clear definition of global leadership, as they argue:

A shared mindset about global leadership is essential in shaping expectations as well as organizational culture. If senior executives responsible for running multi-country operations are the only ones viewed as “global leaders,” other people may not realize that this label applies to them as well and may miss opportunities to engage in day-to-day global leadership thinking and behavior. In addition, if people do not view key aspects of global leadership (e.g., multicultural effectiveness or navigating complexity) as part of their role, they may abdicate that responsibility to others. (p. 199)

Given the continued search for a consensus global leadership definition, which is similar to the developments in the leadership literature for centuries, the identification and examination of potential key concepts of global leadership require the clear explication of a definition remains pertinent.

**Global mindset.** In describing the global mindset, Levy, Beechler, Taylor & Boyacigiller (2007), revive the nature versus nurture debate from the earliest developments of leadership theory as they posit that it is something that develops in individuals over time. The capacity to change perspectives or outlooks over time corresponds with the expatriate experience's contribution to the global leadership literature. Namely, that the patterns of appropriate behavior in one's culture, learned at a young age can become irrelevant in another culture and must be abandoned for the adoption of others in the context of some global work (Osland, 2012). Along a multi-dimensional continuum, global mindset focuses on the individual and cognitive complexity. There are three main components to this construct: the openness to appreciate and understand different cultural attributes, the ability to comprehend and process cultural realities, and the ability to influence across multiple cultures (Levy et al., 2007).

While they are not the first to explore the idea of a global mindset, Levy et al. (2007) made considerable gains in building a construct definition. The researchers define global mindset as “a highly complex cognitive structure characterized by an openness to and articulation of multiple cultural and strategic realities on both global and local levels, and the cognitive ability to mediate and integrate across this multiplicity” (p. 249). Cohen (2010) claims that it is essential for global leadership effectiveness. To develop a global mindset, individuals need an awareness of their surroundings on a personal and communal level (Story & Barbuto, 2011). However, because of globalization, even the meaning of community is not as simple as the term once seemed. Cohen (2010) suggests it is now necessary to think and act both globally and locally simultaneously. Leaders must be cognizant of the “demands from both global and local elements [that] are compelling, while combining an openness to and awareness of diversity across cultures and markets with a willingness and ability to synthesize across this diversity” (p. 5).

**Building blocks.** Osland (2012) modified a framework from a Delphi study of international management using the global leadership literature to discuss competency development, global managers. The model takes the form of a pyramid and has five levels. Each level contains multiple skills or abilities. The shape of the framework aims “to reflect the assumption that global leaders have certain threshold knowledge and traits that serve as a base for higher-level competencies” (p. 67). The pyramid’s base starts with global knowledge and progressively moves to higher levels that reflect traits attitudes and skills. After acquiring knowledge, leaders move onto needed threshold traits of the integrity, humility, inquisitiveness, and resilience. Building on traits, leaders take a step towards the required attitudes and orientations, as well as skills (interpersonal, then system-level).

While Osland’s (2013) adapted framework is comprehensive and addresses different aspects of global leader development, it also presents some limitations. The pyramid model portrays each level as a step that builds upon the preceding level (see figure 1), which ignores the cyclical nature of learning and development (Osland, 2012). Additionally, by including threshold traits, the pyramid model of global leadership seems to suggest that some aspects of being a global leader are innate and unteachable. When the behaviorists supplanted the advocates of trait theories near the middle of the 20<sup>th</sup> century, the notion that leadership was the result of innate characteristics or qualities, alone, gave way to a belief in training and development. The inclusion of threshold traits in a cumulative model may not be favorable to the development of global Some of the shortcomings of the pyramid model likely stem from its adaptation of the results of results that did not sample global leaders and merely applied leadership literature in an ad hoc fashion (Osland, 2012). An alternative to relying on the pyramid model of global

leadership competency is to examine individual competencies directly, as many researchers have in individual studies.



Figure 1. Pyramid model of global leadership. From *Global Leadership: Research practice and development* (p. 68), by J. Osland, 2012, New York, NY: Routledge. Copyright 2012 by Taylor Francis. Reprinted with permission.

**Competencies.** Scholars have identified approximately 160 individual global leadership competencies (Bird, 2012), but framework they advance tends to emphasize a varying number and type. For example, while Terrence Brake (1997) organizes competencies fifteen competencies evenly across three categories, Jokinen (2005) and Bird (2012) use a different methodological approach to distribute more competencies over the same number of categories. Elsewhere, Pless et al. (2011) suggest that global leadership effectiveness will require proficiency in twice as many competencies as traditional domestic leadership. However, multiple forums (e.g., classroom instruction, informal exchanges, and practical experience) can cultivate

the competencies (Oddou & Mendenhall, 2012). In a mixed methods case study of a Finnish manufacturing company, researchers (Salicru, Wassenaar, Suerz, & Spittle, 2016) concluded that regardless of the forum selected for the development of global leadership competence the approach should be experiential. The incorporation of experiential actions and learning was even included in their top 10 best practices for global leadership development. Two-thirds of the participants indicated that they developed global leadership competencies that had a positive impact on the business results at the Finnish manufacturer, although changes in the presence dimension were only virtual.

Terence Brake's (1997) Global Leadership Triad was among the first attempts to delineate and organize global leadership competencies. Based on his review of the extant global business literature at the time and interviews with executives and senior managers from major multinational corporations, Brake constructed a framework for conceptualizing the competencies required for leaders to cope with and respond to the challenges of globalization. Brake suggests three sets of competencies that are necessary to provide effective global leadership: business acumen, relationship management, and personal effectiveness.

Although each competency area contains five skills or capabilities for the individual to develop, the betterment of the global firm is the central concern of each area. For example, business acumen is defined, as "the ability to pursue and apply appropriate professional knowledge and skills to achieve optimal results of the company's global stakeholders" (Brake, 1997, p. 45). Similarly, relationship management is confined to building and influencing the relationships within a global network for achieving business strategies. Additionally, personal effectiveness is merely the ability to perform optimally in furthering the business objectives.

The competency triad orbits Brake's idea of the Transformational Self, which he describes as "a philosophy of possibility and personal engagement with the world – that is a drive toward meaning and purpose through activity strengthened by reflections, personal mind management, and openness to change" (p. 44). Brake contends that in some instances global leaders must unlearn what previously made their firms successful. Ultimately, it is the fifteen capabilities distributed across the three competency areas that will enable global leaders' success.

Taking advantage of the growth in global leadership research, particularly on the expatriate experience, following the establishment of Blake's (1997) competency triad, Jokinen's (2005) review of the literature led to the proposition of an integrated framework of global leadership. Her model conceptualized competencies as layers of skills attitudes and abilities. The analysis of the findings in prior international and global competency studies revealed that while managed to an of competencies, only a small number of key competencies, masked by minor semantic differences, existed beneath the extensive list amassed in the literature (Jokinen, 2005). An integrated framework of global leadership emerged from the synthesis of theoretical and empirical competency publications. Jokinen posits three layers of competencies that are necessary to provide effective global leadership: foundational core, mental characteristics, and behavioral skills.

Each layer contains a unique set of skills or capabilities for the individual to develop in the process of becoming global leaders. For example, core competencies reflect the conditions and capabilities that are the driving force for the emergence of other competencies within a person. Similarly, desired mental characteristics "affect the way an individual attempts to influence others and approaches a certain task" (Jokinen, 2005, p. 206). Finally, behavior-level

global leadership competencies concern individuals' abilities to perform concrete actions and produce tangible results.

Although the number of layers equals the sets of competencies in Brake's Triad, Jokinen's framework has two significant points of divergence. First, the number of competencies in each set is not uniform. Second, as exemplified by the absence of a business or profession-specific category, Jokinen places a greater emphasis on personal and interpersonal competencies rather than prescriptive advice for business performance. Including original empirical data to the analysis, like Brake's interview with business professionals from major companies, could have strengthened the integrative framework. It yet provides useful insights on global leadership competencies.

Jokinen (2005) suggests that new perspective on competencies for global leadership. She views them as continuums, not dichotomous characteristics that individuals possess or lack. Thus, her recommendation for future researchers to focus on the extent of competency development instead of identifying additional lists is not surprising.

Nevertheless, the lists continued to grow. By the time, Allen Bird (2013) replicated Jokinen's approach of reviewing the literature to map a competency framework the number of identifiable competencies in the theoretical and empirical studies published from 1993 to 2012, which encompassed both Brake (1997) and Jokinen (2005), had increased to 160. However, Bird contends that other scholars' attempts to organize the sprawling inventory of competencies "lend themselves to a grouping roughly consistent with Brake's formulation" (p. 83). Hence, he breaks with Jokinen and includes a business component to his three competency categories: business and organizational acumen, managing people and relationships, and managing self. A nearly equal distribution of the 160 competencies occurs across the three categories. Bird (2012) echoes

a sentiment expressed by Jokinen (2005) in the infancy of global leadership research that no single leader possess all of the competencies captured on any model.

Although each category contains five competencies, some competencies are a combination of multiple skills or abilities in other research findings, which results in slightly misleading allocations. For example, business and organizational acumen contain 55 total competencies that concern the efficacious completion of tasks. But a plurality of the competencies (58) falls into the managing of self group. The remaining competencies (47) are in the managing people and relationships category. While the number of individual competencies that comprise each of the five main composite competencies in each type may vary, Bird's (2013) nested framework provides a useful overview of the global leadership competencies.

**Development.** However, developing global leadership differs from preceding eras. For example, in an analysis of case studies on global leaders, Bird and Osland (2006) found that the ethical challenges, designing of learning environments, and tension, among other dynamics were so different in the global arena that the required competencies must be explicitly distinguished from those for domestic leaders. Not only is the work different the type of candidate for the work is different on the global stage. Therefore, the preparation of global leaders must be different from domestic leadership, which McCall and Hollenbeck (2002) suggest in the assertion that global leaders follow a different developmental path – one with lessons derived from cultural experiences. The literature is replete with examples of global leadership development programs. For example, Pricewaterhouse Cooper's (PwC) leadership development program - Ulysses has demonstrated an ability to develop in managers some of the competencies and the mindset required for responsible global leadership (Pless et al., 2011). Ulysses uses a service-learning approach in which participants travel to a foreign destination and work with locals on a project of



benefit to the local community. Similarly, UBS sends its managers on a one-week trip to work full time with nonprofit agencies that dealt with social problems (Mendenhall & Stahl, 2000). The objective of the development program was to expand participants' perspectives and help them better understand people who were different from them. Unlike PwC and UBS, IBM focused on providing variety global experiences to its employees earlier in their careers (White & Rosamilia, 2010).

Although more research is required to determine their appropriateness, the global leadership field has three presumably universal process models of development (Osland & Bird, 2013). Each model reflects a flexibility and capacity for leaders' continuous learning. According to McCall (2010), development is achieved best through placing people in situations that reflect the competencies they need with an experiential approach. Because not responds to experiences the same way, even when using a global leadership development process model, people can receive individualized attention.

One of the earliest attempts to outline the process of developing global leaders focused on executives. McCall and Hollenbeck (2002) devised a model focused on the relationship between individuals and their organizations. They applied a domestic leadership model to interviews with global executives who worked overseas. Perhaps as a result of their sample, they found international assignments to be the best method of development. Their findings led them to conclude that an organization and its people must collaborate on the development process, although the latter of the two parties was ultimately responsible for the development. The business strategy determines what individuals need to develop. However, "global executive development is much more complex and unpredictable and requires a greater focus, effort, and resources concentrated over a longer period" (McCall & Hollenbeck, 2002, p. 172).

Two related models – Chattanooga and Global Leadership Expertise Development – are “conceptual in nature and have yet to be fully validated” (Osland & Bird, 2012, p. 105). They assume that an individual brings his or her unique personality traits and leadership competencies to global work situation like an international assignment. While in the global or cross-cultural context daily encounters and activities, in a nonlinear fashion, connect with past life or work experiences to transform the individual, ideally into a leader with higher levels of global leadership competencies (Osland & Bird, 2012). Despite their need for empirical testing, the models seemingly share similarities with practices supported by studies of global leadership development efforts.

The methods used for global leadership competency development vary nearly as much as the approach scholars employ to it. The concept of high and low contact (Caligiuri & Tarique, 2009, 2012; Terrell & Rosenbusch, 2013), which combines Gordon Allport’s (1954) contact hypothesis with Bandura’s (1977) social learning theory to measure and predict the effectiveness of activities design to teach global leadership skills. Employing quantitative means with hundreds of subjects (Caligiuri & Tarique, 2009, 2012) or qualitative methods (Terrell & Rosenbusch, 2013) high contact experiences that give individuals an opportunity to observe and engage with members of other cultures appear beneficial for global leaders. Such encounters can occur in structured organizational settings or non-work adventures. Cross-cultural experiences can occur without travel and still become high-contact.

**Interactions.** Initially introduced as a response to the racial and ethnic prejudice pervading societies in the 1940’s and 50’s Gordon Allport’s (1954) contact hypothesis held that interaction between members of different groups or cultures have the potential to improve relations and respect for that group (i.e., decrease prejudice). However, Pettigrew (1998)

contends that Allport later posited that intergroup contact (contact theory) could potentially increase levels of prejudice as well. Contact theory has undergone quite an evolution since its inclusion as evidence in the *Brown vs. Board of Education*, school desegregation case (Bronson, 2009). Since its conception, researchers have applied contact theory to some populations that extend far beyond race and ethnicity to include the prejudice against gender, disabilities, age, and sexuality (Pettigrew & Tropp, 2006). Moreover, a wide range of methodologies and inquiries have applied across the scholarly body of literature (Al Ramiah & Hewstone, 2013).

Nevertheless, Allport's four conditions for optimal contact have endured. First, to reduce prejudice, each person in an interaction must have equal standing or status (Pettigrew, 1998). Second, the parties to a contact interaction need a common goal to work towards (Al Ramiah & Hewstone, 2013). As Pettigrew succinctly states, "prejudice reduction through contact requires an active, goal-oriented effort" (1998, p. 66). Third, achievement of the common goal requires cooperation between members of both groups (Pettigrew, 1998). Finally, the interaction needs the institutional support of authorities to reduce prejudice and increase intergroup warmth (Allport, 1954; Bronson, 2010).

After decades of research and refinement, contact theory emerged to hold that when prejudice exists, intergroup contact reduces prejudice and that familiarity with members of other groups will enhance relations between individuals (Pettigrew & Tropp, 2006). Although researchers have attempted to add more conditions to requirements for optimal contact, such as language, initial views, and degree of voluntary participation, Pettigrew (1998) argues such additions "confuse facilitating with essential conditions" (p. 67). He contends that the conditions earliest established conditions by Allport are the "essential" conditions needed for optimal contact.

Elsewhere, the untapped potential of short-term business travel receives attention in the literature (Oddou, Mendenhall, & Ritchie, 2000; Oddou & Mendenhall, 2012). Through the intentional use of specific attitudinal and action strategies, such as traveling to culturally distant (Dragoni et al., 2014) countries, even “international short-term travel can be a transformative experience that internalizes global leadership competencies” (Oddou et al., 2000, p. 171). For example, an American businessperson traveling to China may gain more than one going to Canada. However, the virtual environment can also facilitate the competency development without participants leaving their home country or engaging in business activities, as demonstrated by university students from China and the United States collaborating on a joint online assignment (Y. Li, 2013).

Bikson et al. (2003) recommended higher education institutions now include global leadership in their curriculum. According to Y. Li (2013), “global competence is teachable by providing students with appropriate learning opportunities....Educators must be motivated to engage in globalization endeavors both inside and outside the classroom” (p. 138).

The spatial-temporal considerations notwithstanding, global leadership experiences should be cross-cultural (Caligiuri & Tarique, 2009, 2012; McCall & Hollenbeck, 2002). Perhaps exemplars of global leadership, like Carlos Ghosn, are right to suggest that becoming a global leader is a lifelong process of learning from experiences in familial, professional, social, and educational settings (Stahl & Brannen, 2013). Ghosn is a man of Lebanese descent born in Brazil and educated in France who oversaw the partnership between French and Japanese automakers.

### **Cross-Cultural Theories**

When Geert Hofstede (1984) used the survey data from employees IBM subsidiaries around the world to develop a model for demonstrating the cultural orientation of societies on a

national level based on their answers to issues faced by each in organizing, he provided a framework for understanding what could happen when in cross-cultural encounters. The model began with four dimensions of culture (Minkov & Hofstede, 2011), but subsequent research yielded a fifth and eventually a sixth dimension (G. Hofstede, Hofstede, & Minkov, 2010). The model includes cultural dimensions for power distance, uncertainty avoidance, individualism vs. collectivism, masculinity and femininity, time orientation, indulgence versus self-restraint. Table 1 contains a brief description of each.

Despite its inclusion in the GLOBE study, Hofstede's work faced criticism from scholars at the time. For example, while some acknowledged the model's standing in cross-cultural work, there remained a general "disagreement about the dimensionality of culture" (Dickson, Den Hartog, & Mitchelson, 2003, p. 737). Moreover, some methodological decisions, such as using the employees of one company and developing a model from research with a different purpose, also provide targets for critique.

However, Hofstede (2006) in turn notes criticisms of the GLOBE study. For instance, the GLOBE study utilized Hofstede's model to measure national culture, which is intricate and culture does not necessarily follow national borders. In fact, as national borders change the depiction of cultural dimensions on maps sometimes become outdated (Hofstede, 2018). Additionally, the values measured by GLOBE researchers lacked adequate definition, and their management examples may not apply to leadership issues. While the GLOBE study has its critics, its endurance in the contemporary scholarship highlights its contribution to advancing the development of leadership theory. Ultimately, the complexity of culture notwithstanding, recent findings suggest neither Hofstede nor the GLOBE research provide reliable and valid scales for the cultural dimensions of individuals or organizations (Venaik & Brewer, 2013, 2016).

Table 1

*Hofstede's Cultural Dimensions*

Dimension	Description
Individualism	Extent to which people feel independent, as opposed to being interdependent as members of larger wholes
Power Distance	Concerns people's acceptance of unequal power distributions
Masculinity	A measure of socially-endorsed use of force
Uncertainty Avoidance	A culture's toleration of ambiguity and uncertainty
Long-term Orientation	past, present, or future focus of a people's efforts
Indulgence v. Restraint	extent to which gratification versus control of human desires relates to enjoying life

*Note.* Data in this table are from "The 6-D model of national culture," by Hofstede, 2018 (<https://geerthofstede.com>).

**Intercultural sensitivity.** If Hofstede and associates' examination of culture on a national level is indeed unreliable, perhaps Bennett's (1993) proposition that individuals move through six stages of intercultural development provides a useful perspective for considering the nexus of culture and leadership. He focused on how individuals can develop intercultural competence rather than just the differences that exist in or between particular regions or countries. Just as the GLOBE researchers utilized Hofstede's model to advance their study,

contemporary global leadership researchers (see Li, 2013) employ elements of Bennett's model. Additionally, Bennett's model was instrumental in the development of the Intercultural Development Inventory (IDI), which numerous researchers have used in studies on leadership and intercultural development (e.g., Moodian, 2008; Tarrant, Rubin & Stoner, 2014; Gullekson, Tucker, Coombs, & Wright, 2011). As individuals develop, they can move from the ethnocentric stage to ethnorelativism. The former is characterized by the centrality of one's culture to reality, while the latter reflects the experience of one's beliefs and behaviors as but one viable possibility among many (Bennett, 2004). The straightforward nature of the model may explain its ease of use. The six phases with the two stages (Westrick, 2004; Bennett, 2004) are:

- Denial: reflects a level of contentedness with the familiar trappings of a polarized worldview and monoculture socialization.
- Defense: these individuals are not only committed to their worldview, but they are distrustful of other cultures
- Minimization: The downplaying of cultural differences and individuals choose to believe that everyone is just like them.
- Acceptance: differences are acknowledged and accepted as individuals begin to embrace cultural diversity and chaff at homogeneity.
- Adaptation: Frame and Behavioral Code Shifting reflects a recognition that the range of available perspectives is valuable to the individual which in turn facilitates the abandonment of some old cultural behaviors as well as the adoption of new ones.
- Integration: the full attainment of intercultural sensitivity.

As the shift in the connotation of the phases suggests, the progression from the ethnocentric to the ethnorelative phase occurs when an individual moves from minimization to acceptance.

Although intercultural competence is an antecedent of global leadership (Miska, Stahl, & Mendenhall, 2013), models other than Bennett's (1993, 2004) may offer additional insights.

**Cultural intelligence.** An alternative idea among cross-cultural theories that focus on the individual is the concept of cultural intelligence (CQ). Cultural intelligence is a measure of one's ability to interact effectively with others across cultural lines (Ang & Van Dyne, 2008). The concept emerged from the American diversity in the workplace experiences (Earley, Ang, & Tan, 2006). Other recognized forms of intelligence (e.g., interpersonal, emotional, or social) operate under the assumption that familiarity with culture and context guides individual thoughts and social behaviors, which may not be applicable with people from different cultural backgrounds (Ang et al., 2007). "Applying Sternberg's multiple-loci of intelligence, Earley and Ang (2003) conceptualized CQ as comprising metacognitive, cognitive, motivational and behavioural dimensions with specific relevance to functioning in culturally diverse settings" (Ang et al., 2007, p. 337).

In a general sense, there are four capabilities possessed by culturally intelligent leaders that succeed in today's multicultural, globalized world (Livermore, 2015). Each capability corresponds with the original dimensions and contains specific skills (or sub-dimensions). For Livermore (2015), CQ is more about developing the overall capability to be effective and respectful in any cultural situation, than it concerns becoming an expert on cultures, customs, and traditions. Figure 2 depicts Livermore's conception of cultural intelligence development.





Figure 2. The four capabilities of culturally intelligent leaders. Reprinted from *Leading with cultural intelligence: The real secret to success*, (p. 30), by D. Livermore, 2015, New York, NY: American Management Association. Copyright by AMACOM. Reprinted with permission

The process begins with the Drive (or motivation) to adapt cross-culturally. Intrinsic or extrinsic interests can motivate individuals with the confidence to have intercultural encounters. That willingness for cross-cultural adaptation will lead to increased (cognitive) knowledge of different cultures and norms. Understanding broad systemic patterns as well as nuanced specialized practices will enable individuals to engage in more intercultural encounters. The combination of drive and knowledge allows for a strategic (metacognitive) approach to intercultural encounters. Individuals can then take culturally intelligent actions (behavior) as leaders with their words and actions.

The Cultural Intelligence Scale (CQS) measures individuals' potential to perform and adjust to intercultural encounters along the four dimensions of the construct (Van Dyne et al., 2008; Ang et al., 2007). Numerous studies "provide strong empirical support for the reliability, stability, and validity of the CQS" (Ang et al., 2007, p. 365). As established earlier, the CQS serves as an instrument to quantify (Cultural Intelligence Center, 2005) performance and adjustment performance potential in intercultural encounters among participants. After a series of

studies, Van Dyne, Ang, and Koh (2008) commented on the reliability and validity of the instrument thusly:

Findings of these six studies (n >1,500 unique respondents) indicate that the 20-item CQS holds promise as a reliable and valid measure of CQ. Potential uses of the scale in substantive research include further exploration of the nature and dimensionality of CQ. (p. 35)

In a review of the efforts to validate the CQS conducted by Ang, Van Dyne, and Rockstuhl (2015), researchers conclude that it has repeatedly demonstrated construct validity and measurement equivalence across cultures. Their analysis highlighted the consistency of the CQS across samples, time with repeated measures, and across a range of countries as diverse as the United States, Singapore, and Turkey. The instrument's validity strengthened the potential of cultural intelligence and facilitated its growth from conceptual proposition to its status in empirical research (Ang et al., 2015).

The emergence, in the last few decades, of an array of instruments to test cross-cultural competence led the research team of Matsumoto and Hwang (2013) to investigate the issues associated with the validity of 10 such tests, including the CQS. Although the scales emphasize different aspects of cross-cultural competence, they each have an extensive research base of studies for secondary analysis. Concerning the measurement of cultural intelligence, they asserted that it:

predicted cross-cultural judgment and decision making, general and interactional adjustment and well-being, task performance on a problem-solving simulation, work performance, cultural sales, culture shock, organizational innovation and transformational leadership behaviors, leader and team performance, cooperative relationship management

behaviors, cultural adjustment, travel stress, psychological adjustment, and sociocultural adaptation. (p. 866)

However, they also underscore the mixed findings on studies using the CQS to test the efficacy of intercultural training using a pre-test and post-test design as a note of caution to researchers and practitioners. Others (e.g., Bücker, Furrer, & Lin, 2015) question whether the four dimensions of the CQS best represent cultural intelligence, despite acknowledging its validity.

Thomas and Inkson (2009) explain the need for leaders to establish high levels of cultural intelligence. However, elsewhere, M. Li et al. (2013) demonstrate that learning style and environment influence cultural intelligence development for global leaders. Despite the importance of CQ for leadership success, Earley et al. (2006) caution that leadership behaviors effective in one culture are not necessarily effective in others.

Cultural intelligence (CQ) has a predictive capability that may be of value to the selection and development of future global leaders. In a study of Swiss military personnel in a three-year training program (Rockstuhl, Seiler, Ang, van Dyne, & Annen, 2011) found CQ to be a better predictor of cross-border leadership effectiveness than previous leadership experience or general intelligence. In the globalized world where boundary spanning is a defining characteristic of leadership, having a measure that can predict how people will perform is useful. However, not everyone has a naturally high CQ. Some need to raise their CQ level. International experiences are one way for university students to gain cultural intelligence (Engle & Nash, 2016; Engle & Crowne, 2014; Wood & St. Peters, 2014). In a comparison of university students' past travel experiences, Engle and Nash (2016) found that students who traveled to countries culturally distant from their homeland enjoyed higher levels of cultural intelligence than the travelers to culturally similar destinations. However, the travels to culturally distant international locations

stayed an average of nearly six weeks longer, which may have afforded them with more opportunities for development than their peers.

Elsewhere, Engle and Crowne (2014) compared the change in cultural intelligence for students in a short-term structured study abroad program designed around the contact hypothesis (Allport, 1954) with their classmates that remained at the home university. Only the students from the international travel group raised their CQ level significantly in the second round of testing. Although other factors could explain the difference in score changes between the two groups, one notable finding within the travel group was the raise on all four measures of the cultural intelligence instrument (CQS). Conversely, when Wood and St. Peters (2014) compared CQ changes in MBA students on a short-term study tour, the students' behavioral cultural intelligence increase was not statistically significant.

Within academia, as Bikson et al. (2003) recommended, higher education institutions include global leadership in their curriculum. According to Li (2013), "global competence is teachable by providing students with appropriate learning opportunities...Educators must be motivated to engage in globalization endeavors both inside and outside the classroom" (p. 138). Moreover, Montgomery and Arensdorf, (2012) present short-term study abroad, a growing trend in higher education, as a means for developing students into globally competent leaders. The anecdotal evidence from their university's leadership-focused short-term study abroad opportunity suggests students gain cognitive, attitudinal, and behavioral competencies from participation. However, when Fine and McNamara (2011) used the Global Perspectives Inventory as the instrument in a pretest/posttest design, graduate students participating in short-term study abroad had significant differences in their gains compared to undergraduates.

Today over a quarter million students from institutions across the United States in some form of short-term study abroad annually (Institute of International Education, 2017). The majority of US students studying abroad now do not participate in short-term trips, but the short-term numbers continue to increase. For the most recent decade on record, short-term study abroad participation has increased measurably while travel with longer durations remain static or decline (Institute of International Education, 2017).

Although the Institute of International Education (2017) classifies short-term study abroad broadly as eight weeks or fewer, there are three different program modes available: summer abroad, the study tour, and the service learning trip. Each format has unique characteristics and features but typically last several days to a less than a full academic semester away from the students' home university (Sachau et al., 2010). While the demographics, destinations, and duration of study abroad have changed over time, the types of benefits generated by, and design of, these programs seemingly persists. Students participate because they believe it will enhance their job market prospects (Loh, Stegall, Gallo, & Michelman, 2011; Geyer, Putz, & Mirsa, 2017). Nevertheless, program advocates emphasize the intrinsic worth of international experiences (Tredea, Bowles, & Bridges, 2013).

Not only is there a trend towards short-term study abroad, but it is increasingly advanced as a means of developing global leaders. Though study abroad purists are skeptical of the potential short international experience to have significance (Donnelly-Smith, 2009), innovative approaches like short-term programs are an increasing part of higher education (Brown, Whitaker, & Brungardt, 2012; Montgomery & Arensdorf, 2012; Rosch & Haber-Curran, 2013). Rosch and Haber-Curran (2013), argue that short-term study abroad experiences give institutions a cost-effective way of preparing more students to be citizens with global and cultural

competence. In their mixed methods study of college students on a nine-day learning experience in Italy, the results suggest, “students grow in their personal and leadership development” (p. 152) through study short-term study abroad. Similar trends of positive development in global competence through short-term study abroad exist throughout the literature.

### **Educative Experiences**

Any discussion of experiential education must contain an acknowledgement of the contribution of the American theorist and philosopher John Dewey. In his publication *Experience and Education*, Dewey (1938) offers a critique of the traditional form of educating children and presents his theory of experience as an alternative to the false dichotomy of traditional versus progressive (i.e., absolute student freedom) education. While the former proved too regimented and teacher-directed, the latter was too unstructured and theoretically unsound, to be useful. Instead, Dewey argued for a system that benefits society and learners.

Thus, Dewey charged educators with the task of providing their students with learning experiences that have immediate value and enable contribution to society. However, the mere introduction of experiences alone is insufficient. Dewey (1938) states “everything depends upon the quality of the experience” (p. 16). Two components of the theory of experience are instructive for providing quality. First, mis-educative experiences (i.e., those that impede or hinder the distorting the growth of more experience) should be avoided. Second, the concepts of continuity (i.e., influence on future experiences) and interaction (i.e., the connection between learning and past experiences) should be promoted. Ultimately, the experience’s value will come from its effect on the learner in the present moment as well as the future societal contributions it motivates (Dewey, 1938).

Another critique and proposed response to the traditional practice of education comes from Paulo Freire (1970). Based on his experience working with adult illiterates in Brazil, Freire approached education as a means of transforming society. He described the model of traditional education as a banking system. In that conceptualization, “knowledge is a gift bestowed by those who consider themselves knowledgeable upon those whom they consider to know nothing” (p. 72). Such an arrangement between teacher and learner embodies and reinforces the ideology of oppression and ultimately undermines the discovery process of education.

However, Freire posits a system for education that frees the learner from the oppression of the banking model. Like Dewey, activity in society is the outcome of Freire’s educational philosophy, albeit with a more transformative aim. Through a continuous process of action and reflection, learners can move towards conscientization – the learners’ development of a critical awareness of the true nature of their social reality. Freire’s central thesis was that education could be a liberating for the oppressed.

Thus, he presented dialogics as a vehicle for the liberation of human beings trapped in a system of oppressive societal institutions like schools. Unlike the banking concept of traditional education in which learners are seen as ignorant and teacher all knowing, dialogue presumes equality among all participants in the process. As equals, they can use cooperation, unity, organization and cultural synthesis to education and knowledge as processes of inquiry on the path to freedom.

Like Freire’s work in Brazil, the concept of andragogy popularized by Malcolm Knowles focused on adults. In fact, the adult learning theory, or andragogy is “any intentional and professionally guided activity that aims at a change in adult persons” (Knowles, Holton, & Swanson, 2012, p. 69). Whereas Dewey’s pedagogical emphasis focused on children and

teachers in formal school settings, and Freire's emancipatory approach prioritized societal change, andragogy chiefly concerns the individual.

Moreover, in Knowles' (2012) theory of adult learning – andragogy, which in contrast to the much older concept of pedagogy, focuses on adults instead of children; experiences have a prominent role in the underlying assumptions and principles of learning. Andragogy presumes that among other characteristics, participants “enter the educational activity with a greater volume and more varied experiences than do children... [and] have a readiness to learn those things that they need to know to cope effectively with real-life situations (p. 70).

Experiential education is a philosophy that informs many methodologies, in which educators purposefully engage with learners in direct experience and focused reflection to increase knowledge, develop skills, clarify values, and develop people's capacity to contribute to their communities (Smariga n.d.). One specific learning and teaching methodology used by educators is the experiential learning theory.

Although some (e.g., Stonehouse, Allison, & Carr, 2011) attempt to trace the origin of experiential learning to the ancient Greeks and philosophers like Plato and Socrates, the historical and scholarly records point to a more modern origin. While Dewey was an early proponent of using experiences to educate, he saw it conceptually different from later meanings. In fact, Seaman, Brown, and Quay (2017) note that there is scant evidence that Dewey ever explicitly used the phrase experiential learning in his works. Moreover, in their query of the phrase experiential learning in three major academic databases, of the 62 publications from 1900 to 1950, Dewey authored none.

Although initially approached for assistance with racial and religious intergroup issues Kurt Lewin would ultimately prove instrumental in the establishment of experiential learning



theory (D. Kolb, 1984; Seaman et al., 2017). Along with his colleagues, Lewin held a training using the workshop method in New Britain, Connecticut, June 1946. The unique perspective, interest, and expertise of each trainer shaped the training. They called their imitative a laboratory in human relations training (Seaman et al., 2017). However, by 1947 the project was renamed the National Training Laboratory for Group Development (NTL) and moved to Bethel Maine (“Ntl.org”, 2018).

The work of the NTL would eventually provide a template for encounter group trainings around the country, known colloquially were as experiential learning groups. “Free from its mooring in Lewin’s civic reform and research agendas, experiential learning expanded in the 1960s and 1970s...in a burgeoning [body of] literature” (Seaman et al., 2017, p. 7). The transformation of experiential learning from a model for conducting human relations training into a theoretical framework of learning stems from the work of David Kolb. Experiential learning theory draws on Vygotsky’s activity theory to depict learning as a transaction between the learner and the social environment (A. Kolb & D. Kolb, 2009).

By drawing on the theoretical and philosophical contributions of his predecessors like Dewey, Lewin, and Vygotsky (A. Kolb & D. Kolb, 2009; and Clem, Mennicke, & Beasley, 2014), D. Kolb (1984) came to define experiential learning. It is “the process whereby knowledge is created through the transformation of experience” (D. Kolb, 1984, p. 41). In Kolb’s model, learners progress through four stages in a cyclical nature. According to the model, learning begins with a concrete experience (CE) in which the learner takes part in some activity or action. After observing and reflecting (RO) on the experience, the learner proceeds to develop abstractly conceptualize (AC) what was observed. Finally, the learner will begin active experimentation (AE) of the conceptualizations on future experiences – beginning the cycle

anew (D. Kolb, 1984; David, 2007). Although they follow a predetermined order, a learner can begin at any of the four stages.

The experiential learning survey (ELS) provides an instrument for examining the perceived value of experiential instruction (Clem et al., 2014). Although initially intended for higher education social work students participating in internships, the development and validation process of the ELS reveals greater potential. The researchers began with a pool of 36 items based on the experiential learning literature. After a panel of construct and psychometrics experts removed five items, the research team used a cross-sectional survey design with 553 subjects to establish evidence of convergent construct validity of the remaining 31 items and its four subscales: Authenticity, Active Learning, Relevance, and Utility.

Using confirmatory factor analysis Clem et al. (2014) determined 28 of the items were reliable based on Cronbach's alpha scores. Items with unacceptable loadings ( $<.7$ ) were removed from the final version of the scale. The researchers concluded they had filled a significant gap in the literature by developing a scale for measuring perceptions of the value and utility of learning through experiences.

Concerning study abroad, experiential learning can be understood as learning in which the "dimensions of content, incentive, and interaction are involved in a subjectively balanced and substantial way" (Illeris, 2007, p. 92). Although experiential learning complements traditional educational models, it moves participants beyond the walls of the classroom and into the real world, which will challenge their worldviews and provide them with the ability direct their learning through structured programs (Montrose, 2002; Kotval, Machemer, & Keesler, 2012). Placing students directly in the natural environment they are studying is beneficial and uniquely suited to studying abroad. McClellan and Hyle (2012) found that when taking doctoral students

out of the traditional classroom and into a study abroad environment, participants learned their course content and about themselves, as well as the utility of teamwork processes. Such outcomes correspond with the content, incentive and interaction dimensions referenced by Illeris (2007).

Just as researchers (Caligiuri & Tarique, 2009, 2012; Terrell & Rosenbusch, 2013) use Allport's (1954) contact hypothesis to advance global leadership programs, in higher education, it is used to provide theoretical support for study abroad programs (Mikk & Mendelson, 2010). For example, in a study of U.S. culinary students on a three-week study tour of Vietnam (Livert, 2016) analysis of pre and post trip questionnaires revealed significant positive changes attitudes and perspectives regarding the Vietnamese among the US cooking students. Follow-up interviews with the participants ten years later suggest the short-term study abroad had an enduring impact as the participants expressed less ethnocentric views and considered the Vietnam study tour a seminal moment in their professional and personal lives. Similarly, in a three-week service learning project between universities in the United States and Mexico. The students' short-term study abroad experience design used the intergroup contact principles of equal power and working towards a shared goal. Participants spent time together in both countries, lived together and completed the same tasks. Ultimately, the stereotypical beliefs held on both sides were replaced with more accurate and comprehensive understandings of the respective other (Mickus & Bowen, 2017). Based on a thematic analysis of the participants' final term about the experience, the researchers concluded: "combining experience in a foreign country is most relevant when one can process this experience with someone from that culture" (p. 504).

However, Paris, Nyaupane, and Teye (2014) cast doubt on the efficacy of using the contact hypothesis for these types of student foreign travel experiences. By giving students from multiple university study abroad programs, the same pre-trip post-trip survey, the authors found the expected positive outcomes of reduced prejudice and belief in negative racial stereotypes from intercultural contact do not come from all countries, even within the same program or institution. Perhaps the differences in intercultural contact are not surprising given the differences in national societies as described by the GLOBE study (House et al., 2004) and Geert Hofstede (Minkov & G. Hofstede, 2011). Nevertheless, learning experiences and cultural contact can provide a useful setting for exploring the concept of foreign travel.

When given the choice of participating in short-term study abroad, some students have reduced ethnocentrism and intercultural communication apprehension, while increasing international awareness (Gullekson et al., 2011). Compared to their university peers that opted not to study abroad, the travelers had higher levels of ethnocentrism and intercultural communication apprehension and lower levels international awareness compared to the control group before embarking on their short-term trip. This finding suggests that not all students need to travel abroad to develop some dimensions of global competence. It is worth noting that Soria and Troisi (2014) assert that study abroad, regardless of format, may not be the best way to develop global, international, or intercultural (GII) competencies in university students. In a nation-wide survey of over 15 thousand students at the top public research universities, they found that GII competencies can be developed in students without travel away from their home campus. In fact, “internationalization [through] home [campus] activities can positively influence students’ development of GII competencies as much as—if not more than—traditional study/travel abroad” (p. 273). Simple activities such as taking globally themed courses,

interacting with international students, and participation in global co-curricular activities (e.g., conferences and research projects) are ways students develop both global and intercultural competencies, whereas study abroad was only reported to facilitate the development of intercultural competencies.

Though the popularity of short-term study abroad is relatively new, some benefits conferred to students have become evident. For example, Loh et al. (2011) found that students are willing to pay for such opportunities because they believe that a study abroad program will enhance their job market prospects. The prospect of later financial gain presents an obvious but limited rationale and benefit for students in short-term study abroad trips. Conversely, Marginson (2014) notes that while economic pay-offs are important, students benefit more from the self-formation process facilitated by studying abroad. Self-formation refers to the process by which individuals take steps toward the kind of person they want to become by continuously engaging in the practice of managing their lives and fashioning their change through self-directed agency. Marginson (2014) identifies cross-border international education (i.e., study abroad) as a facilitator of self-formation. Similarly, most believe “in the intrinsic worth of the international experience for its sake. Overwhelmingly, participants pointed to the opportunities that such experiences generated for students” (Tredea et al., 2013, p. 447).

Elsewhere, Glover (2011) found that despite occasional setbacks and frustrations experienced by students during a study abroad trip, successful cultural exchanges between students in international education still occurred. Also, “short-term study travel can help participants understand the situated and shifting nature of their identities as students and travelers. It can also deepen their awareness of how they are positioned globally as students of a U.S. based institution” (Riggan, Gwak, Lesnick, Jackson, & Olitsky, 2011, p. 237). Thus, study

abroad is in part, an experience in which students gain the opportunity to engage with new cultures in a structured and purposeful manner from which both can benefit.

Traveling to another part of the globe would increase global awareness among students compared to remaining in their home-campus classrooms. However, as DeLoach, Kurt, and Olitsky (2015) note, short-term study abroad business courses prove more useful for teaching about global interconnectedness. In some instances, changes in students are more about a change in the way they think, understand, listen, interact, and ultimately lead than it is about the acquisition of a prescribed set of skills (O'Reilly, McCaw, Matt, & Kero, 2013). Increased global awareness can result in students adopting a more equity-oriented leadership style in which they challenge the status quo (Fine & McNamara, 2011). However, the benefits, internal and external, to students require certain inputs from the design of the educational program itself.

According to Jackson (2009), since study abroad generally, increases intercultural sensitivities, programs should include elements that promote intercultural awareness and critical reflection. However, others contend that merely participating in any form of study abroad alone will not nurture a global orientation in students (Tarrant et al., 2014). They contend that the study abroad experience must be combined with the appropriate subject matter content.

To maximize the impact of such trips, before students embark, they should be encouraged to explore the cultural values and the perspectives through which they understand their world (Tredea, Bowles, & Bridges, 2013). After arriving in their new environment, DeLong et al. (2011) recommend that students become immediately involved in an interactive project to create a situation where students can communicate using multiple channels. Ultimately, educators need to include both in- and out-of-classroom learning into the study abroad trip (Ritz, 2011).

In two separate studies (Moodian, 2008; Clayton, 2016) of doctoral-level leadership students that travel to a foreign destination as a required part of their degree program at Pepperdine's Graduate School of Education and Psychology, useful but conflicting insights about the outcomes and potential of travel emerge. For example, under a repeated measures approach using the IDI on cohorts traveling to two different foreign locations (Moodian, 2008) foreign travel did not increase intercultural competence. In fact, rating decreased, though not significantly for the China cohort. However, the inclusion of qualitative questions with the survey instrument in the longitudinal study of the population (Clayton, 2016) revealed that 100% of the sampled participants found the foreign travel had an overall positive affect some felt it lacked sufficient value. Despite their differences, the Pepperdine studies reach a consensus on the need for further research with the population that includes interviewing along with quantitative measures. However, that to date the researcher has been unable to find any published research that shows the value of foreign travel in doctoral coursework or as a contributor to expertise in global leadership.

Although Kolb (1984) identified the transformation from experience as the means of knowledge creation, Jack Mezirow (1990) articulated the Transformative Learning Theory. According to Mezirow, learning is "the process of making a new or revised interpretation of the meaning of an experience, which guides subsequent understanding, appreciation, and action" (p. 1). Under Mezirow's original description of the process, a disorienting dilemma initiated learners' progression through 10 phases that culminated in the reintegration of a new perspective for future encounters into one's life (Kitchenham, 2008).

Disorienting dilemmas are experiences that do not conform to a learner's current worldviews and act as a catalyst for various learning situations. For example, Kroth and Boverie

(2009) present their model of discovery, both of the world and the people in it, as a derivative of transformational learning. They modify the theory to fit their work on student and employee career choice-making, by focusing on whether the transformation is imposed upon or intentional from the learner. Elsewhere, circumstances demand an emphasis on other aspects of Transformative Learning Theory. For example, in the arena of global learning, where “the integration of multiple, and often diverse and conflicting, perspectives, across both macro and micro context” (Kahn & Agnew, 2017, p. 53) is required, the critical reflection, component of the theory is more prominent.

### **Social Innovation**

In addition to the rise of short-term study abroad and global leadership development, another movement is transforming higher education. Institutions are now making it a priority to produce graduates that make a social impact (Ellerman, 2012). The rise of social innovation, which was once considered a buzzword that lacked utility for academic purposes (Pol & Ville, 2009), has come to represent a beneficial component of higher education (Ellerman, 2012; Gamoran, 2018). Based on a review of publication trends on the topic of social innovation, “although more than 30% of articles originated from the United States, the research is international in nature, indicating growing international interest in the role that social entrepreneurship and social innovation has in meeting today’s global challenges” (Phillips et al., 2015, p. 441). Moreover, students are now receiving the support required to develop new ideas and approaches, outside of the traditional curriculum, to address social problems (Ellerman, 2012). While improving the social sector directly, this movement within universities also benefits private business as it helps to create a pool of graduates capable of meeting the needs and challenges of the contemporary workforce. The infusion of social innovation education into



higher education curriculum promotes the development of 21<sup>st</sup> century jobs skills (Rivers et al., 2015). In fact, Adam Gamoran (2018) asserts that the future of higher education may hinge on its ability to impact society with more than just its graduates. He contends that faculty members and institutions must work to change the perceived value of higher education by address real-world problems, particularly in the social sciences, fostering the use of research in policy and practice and bringing knowledge producers and consumers together with the goal of impacting society with new ideas and approaches to solving its problems. Although their activities differ, university students and faculty have central roles in the social innovation movement.

However, it is worth noting that social innovation permeates other areas of education, as well. The Ashoka organization advances social innovation by both working with students on college campuses through its AshokaU program and supporting social entrepreneurs from around the world with access to early-stage financial support and a global network of peers and potential partners to bring their system-changing innovations to society through a fellowship program (Ashoka, 2018). Elsewhere, One World Now, a nonprofit organization founded by an Ashoka fellow, aims to develop the global leaders of tomorrow by providing high school students with foreign language training and study abroad opportunities (One World Now, 2018). The connection between education and social innovation is complex and multifaceted. At times it involves students, at various school levels (e.g., secondary, or postsecondary). Other times it does not center on students, but rather those who work with students (e.g., university faculty or social entrepreneurs).

**Social innovation model.** Nicholls and Murdock (2012) depict a conceptualization of the cross-sector relations that create the space for social innovations to emerge. The model takes the form of a triangle in which each of the three points represents a sector of society – public (i.e.,

the state), business (i.e., private), and civil society. Each one has an ideal form, however “between each of the three ideal-type points lies a spectrum of hybrid institutions and organisations that represent sites for social innovation as a boundary-blurring activity” (Nicholls et al., 2015, p. 9).

The shape of the figure reflects stability in the broader system, even in the midst of social innovation. The triad’s base starts with a combination of business principles with social objectives or ownership structures. On that spectrum, not-for-profit organizations and corporate social innovation initiatives stand as exemplars. However, when the private sector partners with the state, public-partnerships hybrid models for the delivery of government functions or programs like welfare emerge. But when there is a market failure and no legitimate business interest present, the state partners with civil society and social innovation produces a replacement for government rather than a partnership in which sectors work in tandem. For example, the Grameen microfinance system in Bangladesh forms a quasi-state financial market (Nicholls et al., 2015).

While the social innovation triad (Nicholls & Murdock, 2012) is illustrative and highlights the different spaces for social innovation (see Figure 3), it also presents some limitations. The model portrays each point as an ideal type of sector, working in conjunction with another, which minimizes sector-specific drivers that can influence the nature and course of social innovation. Additionally, by focusing on the sectors and their interactions alone, the triad seems to overlook the role of the individual actors or the relations between individuals with one another or institutions. While the social innovation education model (Rivers et al., 2015) may have myopically focused on the individual without significant attention to the broader of societal structure, the social innovation triad may be the inverse with too little focus on the individual or

interactions between individuals (agency) and sectors (relations). Some of the triad's shortcomings of the potentially stem from the general lack of a consensus definition of social innovation. An alternative to relying on the SI triad is to examine its theoretical foundation directly, as some researchers have attempted.



*Figure 3. Social innovation triad. Reprinted from Nicholls, J. Simon, and M. Gabriel, 2015, *New frontiers in social innovation research*, p. 9. Copyright 2015 by Creative Commons International. Reprinted with permission.*

**Defining SI.** The growing interest in social innovation in recent decades from practitioners and academics has become pervasive, although its definition remains elusive (Marques, Morgan, & Richardson, 2018; Milley et al., 2018). Although it may be in nascent stages as a field of study, social innovation is a common dynamic of human history (McGowan & Westley, 2015). Mulgan et al. (2007) made one of the earliest efforts to propose a modern definition of social innovation as new ideas that work in meeting social goals. The simplicity of their definition aimed to distinguish it from both improvement and invention. Ultimately arguing that both “are vital to innovation but miss out the hard work of implementation and diffusion that makes promising ideas useful” (p. 8).

Subsequently, Pol and Ville (2009) noted the debate between analysts and social scientists regarding the utility of the term social innovation in academic scholarship. Like Mulgan et al. (2007), the researchers also reviewed the broader history of innovation (e.g., technological or business) in the literature, once again finding inconsistencies, as well as critical differences that justify the consideration of social innovation as distinct and unique.

Pol and Ville (2009) proposed a definition of social innovation to guide research and facilitate interdisciplinary communication. They viewed it as anytime a “new idea has the potential to improve either the quality or the quantity of life” (p. 881). A review of the practitioner and conceptual literature on social innovation ultimately led Milley et al. (2018) to conclude:

SI [is] an emergent, transdisciplinary, cross-sectoral field that has been coalescing throughout the first two decades of the 21<sup>st</sup> century. Practitioners and researchers of Social Innovation have generated a variety of perspectives on SI, and no single definition or conceptualization of SI currently holds sway. (p. 239)

Given the continued search for a consensus social innovation definition, which is similar to the developments in the global leadership literature, the identification and examination of potential key concepts require the clear explication of a definition remains relevant.

**SI learning framework.** Rivers et al. (2015) attempted to design a framework for the integration of social innovation education into formal academic programs by drawing on the learning theories discussed in the preceding section of this chapter. Their Expanded Model of Learning Theories provides a theoretical understanding of how social innovation education is characterized by the learning theories that emerge from the work of Freire, Mezirow, and Knowles.

Three specific learning characteristics are central to social innovation education: (a) transformation through learning, (b) critical reflection as an essential learning mechanism, and (c) non-traditional place-based learning experiences (Rivers et al., 2015). Rivers et al. (2015) argue that social innovation exists on a more critical plane than the standard higher education curriculum. Students cannot passively reflect on their learning experiences for personal enjoyment, those reflections should lead to transformation through the challenging of old assumptions. Moreover, the experiences should move students to pursue change, typically in a place of significance to the learner. Operating at the nexus of theory and practice will propel social innovation education will develop graduates who aspire to change the world for the better from various career path; thus advancing SI in general.

**SI theory.** Despite the growing research interest in social innovation (Agostini et al., 2017; Phillips et al., 2015), its lack of attention to theory inhibits its maturity as a field (Mulgan, 2012). Its theoretical deficiencies stem from the field's development "primarily as a field of practice, "made up of people doing things and then sometimes, reflecting on what they do [with]...relatively little attention to theory or to history" (Mulgan, 2012, p. 33). Although Geoff Mulgan (2012) suggests there is no single theory of social innovation, there is potential to link together a range of theoretical traditions that tangentially inform social innovation, including:

- Evolutionary change,
- Historical circumstance,
- The dynamics of societal tension and dissatisfaction,
- Collaboration,
- Less objective, context-bound nature of knowledge, and
- Growing interest in well-being and capabilities.

However, if “SI research can achieve greater clarity and make a stronger statement about its potential to make innovative contributions, it will be well positioned to address topical and timely research areas” (Marques et al., 2018, p. 508). Rather than burden researchers, the unsettled theoretical foundations of social innovation present opportunities to test theories against evidence (Mulgan, 2012) and make a meaningful contribution to theory development. One approach to developing the theoretical base of social innovation is to engage emerging or established concepts, which overlap with its core themes and central tenets (Marques et al., 2018).

### **Summary**

This chapter provided a review of the theories, concepts and empirical findings pertinent to this study. First, this chapter traced the evolution of leadership theory from Thomas Carlyle’s great man theory of the 19<sup>th</sup> century to the subtle intricacies of the nascent global leadership discipline. Next, the chapter reviewed a range of cross-cultural frameworks that undergird much of global leadership, followed by a discussion of the major organizational concepts of transnational differences. The presentation of models ranging from Hofstede’s cultural dimensions, which examines national societies, to the more contemporary notion of Cultural Intelligence (CQ), which reflects the complexity and demands of global leadership. However, the chapter concludes with an exploration of learning within higher education to develop global leadership or social innovation. Finally, this illuminated a gap in the existing research concerning the use of learning experiences during foreign travel concerning global leadership theory. A detailed description of the study’s methodology follows in Chapter 3.

### **Chapter 3: Research Methodology**

This study examined a short-term course-based foreign travel experience for global leadership development at a single university in the Western United States. As detailed in the preceding chapters, the use of short-term study abroad and the emergence of global leadership draw upon various elements of culture. Therefore, it was necessary to gather data on each element. Analysis of the results from the sample provided insights on the similarities and differences in cultural intelligence and leadership perspectives among participants following the completion of foreign travel of doctoral-level students studying leadership. In addition to describing the philosophical lens for the inquiry, this chapter will detail the procedures used for securing, analyzing, and protecting the data.

#### **Restatement of Research Questions**

The overarching research question guiding this study is as follows:

In the opinion of doctoral-level leadership students, what are the aspects of academic course-based foreign travel that contribute to the development of global leadership skills?

The study, more specifically, investigated the following sub-research questions:

1. What are the differences, if any, between age group, gender, and ethnicity with regard to perceptions of foreign travel's value?
2. What is the relationship between foreign travel destination and perceptions of foreign travel's value?
3. What are the differences, if any, between the Doctor of Education and Doctor of Philosophy students' perceptions?
4. What is the relationship between perceptions of foreign travel's value and cultural intelligence?

## **Research Approach and Rationale**

A mixed methods approach is well suited for this study because it allowed for the lived experiences of individuals to explain quantitative measures and theoretical perspectives, while also taking advantage of multiple ways to explore a research problem (Creswell, 2014). For this study, the phenomenon was participating in short-term study abroad experiences as a required part of a structured doctoral leadership degree program.

Because the researcher has experienced the phenomenon under investigation, the researcher bracketed himself out of the study by not discussing personal experiences to avoid bias and diverting attention from the explanations participants' experiences (Moustakas, 1994). The researcher used one-on-one interviews to collect data from doctoral students who have participated in a short-term education abroad travel as part of their structured degree program to assess the perceived value of foreign travel. By recording and transcribing the interviews, the researcher extracted insights about topics that otherwise might have gone undiscovered, which was consistent with expectations from literature.

Despite the increased appreciation of innovation's social dimension (Cajaiba-Santana, 2014), Yee, Raijmakers, and Ichikawa (2019) suggest that much of the assessment of innovation still relies on accounting principles and quantitative means that emphasize economic results to judge a project's success or failure. Such measures, however, can be incongruent with the goals of the involved parties. They relied on their reflections on cases from two social innovation programs in – one in Europe and the other in Asia – to discuss cases in which transformative learning was the impact produced by social innovation activity.

In an attempt to reorient the discussion on impact in both design and social innovation toward social and away from economic value, Yee et al.(2019) focused on transformative



learning, and the transformation participants in social innovation programs underwent to assess impact. The researchers contend that “by focusing on learning and tracking transformative changes that occur in the participants involved in social innovation programs, we are able to reveal more meaningful indicators of social impact” (p. 2). However, Ramirez (1999) was one of the first to present an alternative framework for value creation to reflect the forms emerging with the passing industrial era. His ‘value co-production’ framework “emerged from a long intellectual history, but it... only came to fruition near the turn of the century as sociotechnical breakthroughs... allowed it to emerge in practice” (Ramirez, 1999, p. 61).

### **Assumptions**

Assumptions regarding experiential education and cross-cultural interaction exist, yet mixed methods research provides a comprehensive means of analyzing the research problem in prior literature. As a research approach, mixed methods allowed one approach to mitigate another’s weaknesses while also accentuating its strengths; for example, using interviews to complement the survey (Creswell, 2014). Further, according to Creswell (2014) a mixed methods study can “integrate the information [from both methodological approaches] in the interpretation of the results” (p. 15), while also probing contradictory or incongruent findings.

The viability of this research as a mixed-method study rests on four assumptions:

1. The first assumption is that there are instances in which both quantitative and qualitative research methods are inadequate.
2. The second assumption is the belief that qualitative research is a legitimate approach experiences in a. A mixed method approach assumes that the researcher properly represents the experience to the public, subsequent to the research.

3. A mixed method approach assumes that the researcher properly represents the participants' experience, for both phases, to the public while also providing a safe and protective space for participants.
4. Finally there is an assumption that participants will provide responses that reflect their true feelings in both data collection phases.

### **Conceptual Framework**

The interpretivist worldview provides the lens for the research design and data analysis in this study. Although interpretivism traces its roots and views to different disciplines, its assumptions and beliefs continued the philosophical shift away from positivism's approach to the social sciences that emulated natural sciences research. However, interpretivism's critique of positivism went a step beyond the postpositivists by promoting the acceptability of both subjective and objective research methods. The interpretivist paradigm developed as a robust critique of the scientific approach to studying human activity. Kant's *Critique of Pure Reason* laid a foundation for interpretivism, arguing that people interpret their sensations; they do not directly experience the "out there" world as it is. Similarly, Wilhelm Dilthey argued that understanding was the goal of social science research and that the lived human experiences the proper topic of social science research (Willis, 2012).

The interpretivist paradigm assumes the nature of reality is socially constructed, drawing upon multiple perspectives (Gray, 2014). The philosophical tradition of social constructivism, therefore, has a significant influence on this research study. Constructivism aims to develop an understanding of phenomena based on participants' interpretations as well as the social and historical context of the phenomena (Creswell, 2013). This melding of interpretations and social-historical context allows researchers to construct new knowledge and understandings. Studies

with a constructivist lens focus on topics broadly and utilize open-ended questions to give the participants as much latitude as possible to build meaning from their experience (Creswell, 2013).

A social constructivist view of knowledge in leadership research reinforces the importance of perceptions, multiple interpretations that shape a shared reality. According to social constructionism, knowledge originates in society it is not predetermined by the natural order. Things have meanings because people come together and agree they mean something as a way to make sense of reality, which allows researchers to probe questions about how people make sense of their experiences (Slater, 2017). Since leadership is a socially constructed phenomenon, the constructivist epistemology is appropriate for leadership research (Klenke et al., 2016).

The constructivist epistemology is thus suitable for this study of global leadership. The epistemology of this study is rooted in social constructivism. For Lev Vygotsky (1978), learning was an inherently social process. Social interactions with others and the environment allow learners co-construct knowledge (McLeod, 2014). The learner is seemingly inseparable from others and the environment. Decades of debate and the trajectory of research (Franks, 2014; McLeod, 2014) have led to diverse stances on constructivism. Some conclude that it “has succeeded in designating learning as an active process where meaning is acquired through a process of meaning-making rather than through the simple transmission of knowledge or through a behaviourist conditioning of response” (Derry, 2013, p. 45). Further, Lave and Wenger (1991) expand upon the idea of learners interacting in social contexts to facilitate learning, with their theory of situated learning in which participation and engagement lead to formal and informal networks that can aid skill acquisition, development, and personal growth through communities

of practice (Aubrey & Riley, 2016; Lave & Wenger, 1991). Similarly, within social innovation research, an epistemological there is a “challenge in recognizing and incorporating multi-stakeholder perspectives in understanding social value” (Yee et al., 2019, p. 4).

### **Research Design**

The design of this study involved two distinct but related phases. It employed methods from both the quantitative and the qualitative research approach. This study used a sequential explanatory mixed-method approach (Creswell, 2014) that included an initial survey containing quantitative questions. After completing the survey, participants had an opportunity to volunteer for an in-depth follow-up interview that facilitated interpretations and explanations of the survey data. Each phase had a specific design and required procedures. In the quantitative phase (Phase I), a survey instrument allowed for the acquisition of numeric data. Subsequently, the qualitative phase (Phase II) relied on a phenomenological design to describe the participants’ common lived experience (Creswell, 2013) to explain and interpret the Phase I findings. Together these two phases provided the data necessary to address the research questions (see Figure 4).

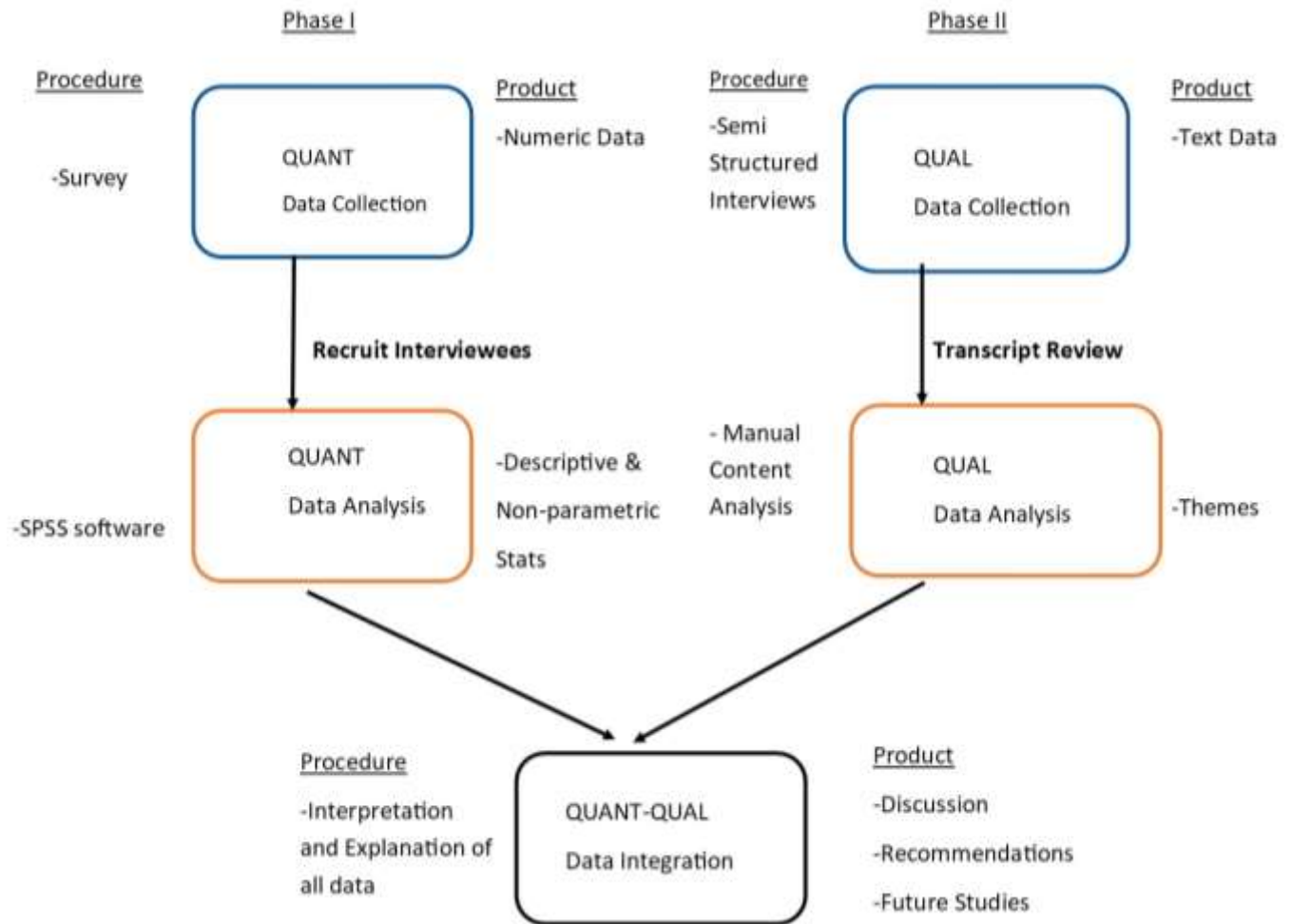


Figure 4. Sequential explanatory mixed method design. From “Using mixed methods to assess fidelity of delivery and its influencing factors in a complex selfmanagement intervention for people with osteoarthritis and low back pain,” by E. Toomey, J. Matthews, and D. A. Hurley, 2017, *BMJ Open*, 7, p. 6. Copyright, 2017 Creative Commons. Adapted with permission.

### Researcher’s Role

Creswell (2014) suggests that researchers should declare their biases when conducting research. Such declarations enable consumers of the results to more fully understand and appropriately assess them. Based on the literature review (Chapter 2), the researcher was able to find information in the body of knowledge on whether study abroad could develop global leadership competence. (Montgomery & Arensdorf, 2012; M. Li et al., 2013; Soria & Troisi, 2014). However, it did not appear to include research on the participants’ perception of the value

of foreign travel, particularly for the doctoral student population. Therefore, the researcher intentionally proposed this study to fill a niche in the global leadership research. In addition to scholarly motivations, the researcher brought with him the following potential personal biases to this study:

- Past participation in the program under investigation;
- Three years of work experience for the institution that operates the program; and
- Other research initiatives about the phenomenon being studied.

Nevertheless, some methodological safeguards mitigated these and other latent biases.

### **Bracketing**

The practice of bracketing, which originated within phenomenological research (Tufford & Newman, 2010), is a technique researchers use to minimize the impact of their preconceptions on their qualitative research. Recognizing and acknowledging potential biases helps prevent their undue influence on the solicitation or interpretation of data. To the extent humanly possible, researchers must set aside their ideas and experiences to focus on the participant's views of his or her experiences (Moustakas, 1994). Even after identifying and acknowledging one's biases, Creswell (2013) recommends reporting them in the final research work product so that information consumers can more fully assess the interpretation and results.

**Procedures.** To keep personal feelings and opinions out of the data gathering and analysis, the researcher employed three-prong bracketing. First, during the data collection and analysis, the researcher recorded elements of the research that provoked reflection or evoked reactions in a journal of dissertation events. Such a reflective log prevented inclusion of the researcher's concerns or opinions of the process or participants in the study findings. Moreover, maintaining a journal of biases makes it easier to report them to future readers, enabling them to

evaluate and interpret the study's results accurately. This plan will help preserve the integrity of the research findings and conclusions.

### **Research Participants**

This study recruited subjects for this study from Pepperdine University's Doctor of Education in Organizational Leadership (EDOL) and a Doctor of Philosophy in Global Leadership (PGLC) programs. There are approximately 200 current students at different stages of progress in the two programs. Each program requires the completion of a short-term course-based international trip as part of the requirements for completing the program. The destinations available to the students range from Belize and Cuba in the western hemisphere to China and India in the east, among other international destinations. The trips last one week to 11 days in duration and the traveling cohorts usually range from 10-50 students depending on the destination and student availability. Each destination has a unique travel itinerary, and some use different program formats. For example, the China trip is a study tour, whereas Belize more closely resembles service learning. This short-term study-abroad is part of the EDOL and PGLC program's *Global or International Policy Experience* course, which aims to provide doctoral students acquire an international perspective on policy development through visits with leaders of other countries and organizations.

While the degree programs aim to equip individuals who have thriving careers with advanced knowledge in the theory and practice of leadership (EDOL) or prepare students to shape innovative directions in research and careers (PGLC), the respective courses both require travel to an international location. The common objective is to examine alternative economic and policy systems or leaders, according to the Graduate School of Education and Psychology catalog 2017-2018 (Pepperdine University, 2017).

## **Data Sources**

This study focused on current Pepperdine EDOL and PGLC students who have completed their International *Policy Experience* course. Currently enrolled doctoral students may be in either the coursework or their dissertation phase. Thus, participants will be in year two to seven of their academic program. Students who have withdrawn or filed for graduation, at the time of recruitment were not included.

**Sampling.** This study recruited participants through purposeful selection (Creswell, 2014). Unlike purely quantitative research, which requires larger randomized samples to facilitate the generalizability of its results, the present study can utilize a more targeted selection of participants to provide relevant data. Purposeful (or purposive) sampling allows researchers to invite members of a larger population into a study based on a belief that they will provide useful data on the phenomenon, problem or purpose of interest (Gray, 2014). According to Miles and Huberman (1994), when using purposive sampling, researchers must consider the setting, subjects, and phenomenon under investigation. Such factors are integral to the sampling technique.

Elsewhere, Gray (2014) notes that the convenience technique is one of the most common in purposive sampling. However, it is neither purposeful nor strategic if merely done to save the researcher time and money without regard to the criteria of the participants. Although Teddlie and Yu (2007) suggested that it is possible, and at times advisable, to use multiple techniques when purposefully sampling, this study relied on convenience sampling.

## **Data Collection**

Permission to contact current students in the EDOL and PGLC international learning travel experience courses came from Pepperdine University Graduate School of Education and



Psychology. Specifically, written permission to contact students in the Leadership Studies Department was obtained via a signed letter from the program director, Dr. June Schmieder (see Appendix A). Once authorized, the department staff contacted students via an email containing an invitation to participate in the study (see Appendix B) and a link to an electronic copy of the survey on *Qualtrics*, a survey software provider. Although a peer review process established the usability of the survey and the dissertation committee provided an expert review of its content, its dissemination was contingent upon approval from Pepperdine University's Institutional Review Board.

The survey contained an electronic informed consent form (see Appendix C) approved by Pepperdine University's Institutional Review Board (see Appendix F). An application for a waiver to alteration the informed consent process was submitted to the IRB to promote a greater level of confidentiality and simplicity for participants. Below the informed consent text and before continuing to the survey questions, participants had an opportunity to check one of the two boxes; either Yes he or she accepts the terms, or No he or she does not. The invitation email was sent twice to potential participants in bulk form from the Leadership studies department - once during the semester when IRB approval was granted and again at the beginning of the following semester. A link to volunteer for the phase II interview portion of the study was included at the end of the survey. Given the number of eligible students and the average internal survey response rate of nearly 36% (Baruch & Holton, 2008), sufficient data were available for statistical analysis (50 or more respondents). The researcher was also able to interview 12 students for an average of nearly 45 minutes each, in line with phenomenological practices.

**Interviews.** In qualitative research, interviewing is a commonly used for data collection (Denzin & Lincoln, 2000; Gary, 2014; Creswell, 2013). In fact, the semi-structured interview is

one of the most frequently used approaches to interviewing. Concerning semi-structured interviews, Ayres (2012) notes that open-ended questions seek narrative or concrete information.

Although the items on the interview protocol were arranged in a sequence that aligned with the research questions, when the interviewees addressed later questions in their earlier answers, the researcher skipped the questions later in the protocol, as suggested by Rubin and Rubin (2005). They described the flexible manner in which researchers use questions in semi-structured interviews to allow for probing to clarify or elicit more information from the interviewee. However, the researcher took care to bracket suppositions when deviating from the prepared protocol.

Creswell (2014), recommends pilot testing the protocol to enhance the validity of interview questions. In addition to providing insights on the questions themselves, pilot testing also informed the researcher of the interview time requirements as well as where a prepared utterance or interviewee prompting was required.

### **Human Subjects Considerations**

This research study involved interactions with human subjects and therefore had to meet the federal requirements for research. The subjects for this study were current doctoral leadership students at Pepperdine University. The researcher was transparent with the participants regarding the purpose and nature of the study as the participants when soliciting their participation. Participants received information explaining that their involvement is voluntary and that they were encouraged but not required to answer every question, and that they had alternatives to full participation. Namely, completing the survey but not the interview or skipping phase I questions. The researcher provided participants with an explanation of confidentiality to confirm that the study would only report aggregated data. Moreover, the data would be stored in password-

protected files on a secure computer. The identity of the participants will not be in any published materials. All participants received a numeric code name, unrelated to their identity. The confidentiality protections notwithstanding, the research contained some risk.

Possible risks of participation were no are more than minimal, like those present for an individual participating in daily social interactions. However, reflecting on past travel may cause some discomfort for individuals with bad experiences, and thus safeguards were kept in place. While there are no direct benefits to the study participants, there are potential and anticipated benefits to society. The anticipation is that they include a new understanding of the relationship between global leaders learning experiences and the role culture can play in one's development. As this is a research study, the potential and anticipated benefits are contingent upon the findings and recommendations of the study.

The study offered no incentives to elicit students' participation. Likewise, there are no known conflicts of interest for the researcher. Deception was not a part of the research. Participants faced no risk of physical harm. All participants were free to withdraw from the study at any time for any reason without consequence. All appropriate copyright clearance or licensing will be sought for the quantitative phase. However, copyright clearance or licensing were not needed for the interview, as the researcher developed the interview questions based on the literature, peer and expert review processes. The researcher applied to the Pepperdine University Institutional Review Board (IRB) for Exempt status. The author completed the Collaborative Institutional Training Initiative (CITI) for working with human subjects or participants as part of the IRB application.

## **Instrumentation Tools**

Phase I used a combination of the Cultural Intelligence Scale (CQS) and the Experiential Learning Survey (ELS). Both instruments use a 7-point Likert-scale self-report style ranging from (1) “strongly disagree” to (7) “strongly agree.” The four dimensions of the CQS are as follows: four metacognitive CQ, six cognitive CQ, five motivational CQ, and five behavioral CQ questions. In addition to the CQS, the survey will include two subscales from the ELS that address relevance (9 questions) and utility (7 questions) of a learning experience. Additionally, this survey added demographics questions on (a) destination of travel for course, (b) year of travel, (c) ethnicity (d) gender, (e) age group, and (f) degree program (see Appendix D).

**Survey validity.** The four subscales of the cultural intelligence scale (CQS) have consistently proven to be valid in research (O’Keefe et al., 2017; Van Dyne et al., 2008). It has convergent, discriminant, and incremental validity (Cultural Intelligence Center, n.d.). Similarly, the developers of the ELS empirically established its construct validity (Clem et al., 2014). To enhance the validity of the instrument for this study, Ph.D. graduates in global and organizational leadership tested the usability of the instrument. According to Roe (2011), usability testing is a way to measure how well subjects use a computer-delivered survey, and it can increase the previously established validity and reliability of a survey. There are numerous reasons to test the usability of a survey (Geisen & Bergstrom, 2017; Roe, 2011). For example, by giving the survey to individuals like those that will provide data for the research, features that may unduly burden (Geisen & Bergstrom, 2017) or hinder actual participants delivery of useful data (Roe, 2011) can be corrected. There are other steps and processes like the peer and expert reviews that can address the content of a survey, but usability testing can identify errors unrelated to subject matter or methodological expertise (e.g., display on mobile devices versus computers).

However, Phase II utilized an interview protocol derived from the literature review. It contained seven questions (See Appendix E). The researcher established validity for the interview protocol using a four-step process.

**Protocol validity.** The following four steps worked in tandem to establish validity the interview protocol's validity:

1. **Prima Facie:** As a first step in establishing instrument validity, the determination rested on whether measures on the interview protocol made sense on their face (Vogt, 2005), in light of the literature.
2. **Peer Review:** After establishing face validity, four graduates of the Pepperdine University leadership programs validated the instrument in a peer review process. Each received a copy of the interview and research question (See Appendix E) as part of the survey usability test. They provided feedback, comments, and revision recommendations based on their understanding of the study's research questions and purpose.
3. **Pilot Interview:** Using the iteration of the protocol that emerges from the second validation step, a pilot interview was conducted with a student who could have met the criteria for participation, but was not used in the analysis, to gain additional insights regarding the clarity, diction, and connotation of the interview questions. Feedback from the pilot interviewee informed the version of the instrument submitted to the panel of experts.
4. **Panel of Experts:** Expert reviews of the interview protocol will come from the researcher's dissertation committee. They provided feedback, comments, and direction for the final iteration of the interview questions before submission to the university institutional review board.

Since reliability concerns consistency, the reliability of a research instrument is determined by how consistently it produces the same results (Creswell, 2014).

### **Validity and Reliability**

According to Creswell (2014), research credibility hinges on the reliability and validity on three factors, namely its: (a) design, (b) instrumentation, and (c) interpretation of results. In qualitative research, validity deals “with description and explanation and whether or not the explanation fits the description” (Denzin & Lincoln, 2000, p. 393). Reliability concerns the consistency of the researcher’s approach with peers’ and other projects, as well as the administration and scoring of instruments (Creswell, 2014). However, Denzin and Lincoln (2000) assert that it is time to question the use of these terms, borrowed from the quantitative paradigm. Nevertheless, the concepts have some relation to this mixed-methods study.

### **Data Analysis**

For the quantitative phase of the study, in addition to descriptive statistics, similarities and differences among the variables in the demographics questions and scores on the CQ Scale and ELS emerged from statistical tests such as the Mann-Whitney U. The SPSS statistical software was used to run all statistical analyses.

The analysis of the Phase II data utilized content analysis on the interview transcripts. After the transcription of all interviews, the first step in analyzing the content was a full reading of each transcript in its entirety, without critique or analysis to facilitate immersion. A cautious reading of each follows the uncritical reading of the transcripts. During the second reading, text that appears to describe an example pertinent to the investigation was highlighted. In addition to the highlighting, some keywords or phrases that convey the interviewee’s intent or ideas were

written in the margin of the transcript. It is worth noting that the keywords or phrases came directly from the transcript.

The researcher manually coded and labeled themes within the interview transcripts. After open coding of enough transcripts to ensure saturation (Salandaña, 2013), preliminary codes were established. Then the remaining transcripts were coded (pre-saturation papers re-coded) using the preliminary codes, and new codes were created when data that proved incompatible with the existing codes. Once all transcripts were coded, the data within each code was examined and placed into categories. Examination of the data led to the merger of some codes, while others are divided into subcategories. Each code and category was defined by its exemplars. Subsequently, after comparison with the literature review, an expert panel (i.e., the dissertation committee) reviewed the themes. Table 2 contains a summary of the steps in the content analysis process.

Table 2

*Content Analysis Steps*

Step	Procedure
1	Read for immersion in the data
2	Derive preliminary codes
3	Revise and expand codes
4	Sort codes into categories
5	Define each code and category
6	Identify code and category exemplars
7	Diagram categories
8	Literature and peer review

## **Data Management**

The data and all associated files for this study will remain confidential throughout the life of the research with specific safeguards. First, all data will be de-identified and locked away immediately after collection. Second, the reporting and presentation of findings will be as aggregates. Finally, data, documents, and audio recordings will be protected and preserved for as long as the University requires.

## **Summary**

This chapter has detailed the philosophical, quantitative, and qualitative aspects of the research methodology guiding this study. This chapter has also outlined the procedures and processes the researcher used to collect data from human subjects in a manner consistent with protections required by the IRB. A detailed plan for the analysis of the gathered data was also included. The results of that analysis are presented in the next chapter.



## **Chapter 4: Results**

This study sought to explore academic course-based foreign travel in for doctoral students at the Pepperdine University GSEP. The study employed a sequential explanatory mixed methods approach first to gather quantitative data followed by the collection of qualitative interview data. Both phases were completed using online platforms. This chapter shares participant demographics, and an analysis of the data collected about the research questions.

### **Restatement of the Purpose**

The purpose of this study was to examine the value of short-term foreign travel for students in developing expertise in global leadership expertise by measuring the utility and relevance doctoral students place on such experiences as part of a structured degree program. More specifically, the study aimed to explore what relationship (a) demographic characteristics, (b) degree type, and (c) destination may have on perceptions of value.

### **Phase I Quantitative Data Analysis**

The first phase of the study involved a survey, hosted by the Qualtrics survey tool. The survey contained eight demographics questions concerning identity features and travel history, as well as 36 Likert scale items from the cultural intelligence scale (CQS) and experiential Learning Survey (ELS).

**Phase I participant demographics.** One hundred forty-two current doctoral students in the Education Division at Pepperdine University Graduate School of Education and Psychology received a link to the survey in a participation invitation email. To ensure the sampling met the inclusion criteria, the Associate Program Director only sent the participation email invitation to those students for which she had a university email address on file. Although 61 students used the survey link in the invitation email, nine respondents only consented to participate and did not

answer any other survey questions. Two respondents consented and provided demographic information but answered less than half of the other instrument items. As a result, only 50 participants were included in the phase I analysis. Table 3 contains the frequency counts for the 50 participants.

Females outnumbered males 26 to 24 in Phase I. The age 30-39 and 40-49 categories tied for the largest representation. Each age group had 36% of the respondents ( $n = 18$ ). Only one survey participant declined to provide her age. The average age of the other 49 survey participants is 41.89. China and Belize represented the most visited destination, with 38 and 34 percent of the participants, respectively. The most frequently selected race was White, with 42%, while a lone respondent identified as Hispanic. Of the remaining participants, African Americans had the next highest frequency ( $n = 18$ ). More students were pursuing Ph.D.'s than Doctor of Education degrees (52% to 48%). Eight respondents visited 21 or more countries, but nearly twice ( $n = 15$ ) as many had visited up to five (see Table 3).

Table 3

*Phase I Participant Demographics*

Gender	<i>n</i>	%
Female	26	52.00
Male	24	48.00
Age	<i>n</i>	%
Under 30	4	8.00
30 to 39 years	18	36.00
40 to 49 years	18	36.00
50 to 59 years	5	10.00
60 or over	4	8.00
Prefer Not to Say	1	2.00

(Continued)

Ethnicity	<i>n</i>	%
Asian/Pacific Islander	4	8.00
Black/African American	18	36.00
Caucasian/White	21	42.00
Hispanic/Latino	1	2.00
Mixed/International	6	12.00
Degree Program	<i>n</i>	%
EDD	24	48.00
PHD	26	52.00
Countries Visited	<i>n</i>	%
1 to 5 countries	15	30.00
6 to 10 countries	7	14.00
11-15 countries	14	28.00
16-20 countries	6	12.00
21 or more	5	10.00

### Answering the Research Questions (Phase I)

The central research question in this study was: In the opinion of doctoral-level leadership students, what are the aspects of academic course-based foreign travel that contribute to the development of global leadership skills? Four sub-research questions support this main research question.

**Sub-research question 1.** What are the differences, if any, between age group, gender, and ethnicity with regard to perceptions of foreign travel’s value? Value as defined in Chapter 2, is a combination of utility and relevance. Table 4 compares the mean perceived value of the global learning experiences by participants’ age group. Although the oldest group of students (age 60 and above) had the highest perceived value of the foreign travel –based learning experience and gave it the highest average relevance rating, it was the youngest group (age 20-29) that reported the greatest mean utility. Despite these differences, relevance was rated higher across all age groups. However, additional testing was required to determine if the differences

were statistically significant. Although there is a positive correlation between age and perceived value scores, the relationship is not statically significant as the p-value is  $>.05$ . (See: Figure 5).

Table 4

*Mean Perceived Value by Age Group*

Age	Relevance	Utility	Perceived Value
20-29	5.7778	5.1071	5.4844
30-39	5.4568	4.6905	5.1215
40-49	5.3580	4.7778	5.1042
50-59	5.0889	4.2571	4.7250
60-69	5.9333	4.9143	5.4875

*Note.* Based on 7-point scale: 1= strongly Disagree to 7 = Strongly Agree.

		Age	PV
Age	Pearson Correlation	1	.055
	Sig. (2-tailed)		.707
	N	49	49
PV	Pearson Correlation	.055	1
	Sig. (2-tailed)	.707	
	N	49	49

Figure 5. Pearson correlation of age and perceived value (PV).

Table 5 compares the mean perceived value of participants by gender. Although both female and male participants attributed higher relevance than the utility to their foreign travel experience, male students reported a higher level of utility than their female counterparts. However, females had a higher overall perceived value. Additional statistical testing revealed supplemental information regarding these differences.

Table 5

*Mean Perceived Value by Gender*

Gender	Relevance	Utility	Perceived Value
Female	5.4915	4.7198	5.1538
Male	5.4213	4.7500	5.1276

*Note.* Based on 7-point scale: 1= strongly Disagree to 7 = Strongly Agree.

Given the difference in means and effects of the small sample size, the Mann – Whitney U test was used to find no statistical significance in the difference in the means based on gender (see Figure 6).

		Gender	N	Mean Rank	Sum of Ranks	PV	
PV	Female		26	25.48	662.50	Mann-Whitney U	311.500
	Male		24	25.52	612.50	Wilcoxon W	662.500
	Total		50			Z	-.010
						Asymp. Sig. (2-tailed)	.992

*Figure 6.* Mann-Whitney U test perceived value (PV) by gender.

Table 6 compares the mean perceived value of global learning experiences by participants’ ethnicity. Participants that Identified as multiracial or as a foreign national (i.e., mixed) had the highest perceived value scores, as well as the relevance and utility factors. However, all participants rated relevance higher than utility. Further statistical testing revealed more insights regarding the differences based on ethnicity.

Table 6

*Mean Perceived Value by Ethnicity*

	Relevance	Utility	Perceived Value
Asian	5.36111111	4.642857	5.046875
Black	5.54938272	4.698413	5.177083
Mixed*	5.72222222	5.166667	5.479167
White	5.5026455	4.795918	5.193452

*Note.* Based on 7-point scale: 1= strongly Disagree to 7 = Strongly Agree.

\**Note.* Includes Hispanic/Latino category

**Sub-research question 2.** What is the relationship between foreign travel destination and perceptions of foreign travel’s value?

Table 7 compares the mean perceived value of global learning experiences by participants’ country of destination. Participants identified Cuba as the destination with the highest relevance, utility and overall value. All destinations had a higher relevance than utility rating. When grouping destinations by geography (i.e., East and West), the eastern hemisphere (i.e., India & China) had the largest average perceived value (See Table 8). Conversely, when grouped by political orientation, the closed societies (Cuba & China) had the highest relevance, utility and overall value (see Table 9).

Table 7

*Mean Perceived Value by Destination*

	Relevance	Utility	Perceived Value
Cuba	5.87302	5.04082	5.50893
India	5.75556	5.02857	5.4375
China	5.4386	4.8797	5.19408
Belize	5.40523	4.51261	5.01471

*Note.* Based on 7-point scale: 1= strongly Disagree to 7 = Strongly Agree.

Table 8

*Mean Perceived Value by Destination Geography*

	Relevance	Utility	Perceived Value
East	5.50463	4.91071	5.24479
West	5.54167	4.66667	5.15885

Based on 7-point scale: 1= strongly Disagree to 7 = Strongly Agree.

Table 9

*Mean Perceived Value by Destination Orientation*

	Relevance	Utility	Perceived Value
Closed	5.555556	4.923077	5.278846
Open	5.484848	4.62987	5.110795

Based on 7-point scale: 1= strongly Disagree to 7 = Strongly Agree.

Using the Mann – Whitney U test there is no statistically significant difference in the means based destination grouping by geography (Figure 7) or societal orientation (see figure 8) for perceived value.

PV	East	N	Mean Rank	Sum of Ranks
	East	24	25.63	615.00
	West	24	23.38	561.00
	Total	48		

	PV
Mann-Whitney U	261.000
Wilcoxon W	561.000
Z	-.557
Asymp. Sig. (2-tailed)	.577

Figure 7. Mann-Whitney U test for perceived value (PV) by destinations geography.

Cluster	N	Mean Rank	Sum of Ranks
Open	22	22.27	490.00
Closed	26	26.38	686.00
Total	48		

	PV
Mann-Whitney U	237.000
Wilcoxon W	490.000
Z	-1.015
Asymp. Sig. (2-tailed)	.310

Figure 8. Mann-Whitney U test for perceived value by destination orientation.

**Sub-research question 3.** What are the differences, if any, between the Doctor of Education and Doctor of Philosophy students' perceptions?

Figure 10 presents the descriptive statistics for the perceived value (PV) and cultural intelligence (CQ) as well as their related factors, for participants by degree program. Although both Doctor of Education and Doctor of Philosophy students attributed higher relevance than utility to their foreign travel experience, Doctor of Philosophy students reported a higher level of relevance and overall value than their counterparts. Additionally, Doctor of Education students reported slightly higher utility (see Figure 9). However, the mean values for Doctor of philosophy students were higher on cultural intelligence across all four factors — these differences in means required further statistical testing to explain fully.

Using the Mann – Whitney U test there is a statistically significant difference in the means based by degree program for the perceived value (see figure 10), but not for cultural intelligence (see Figure 11).

	Degree	N	Mean	Std. Deviation	Std. Error Mean
REL	EDD	22	5.1515	1.08137	.23055
	PHD	28	5.6984	1.02989	.19463
UTL	EDD	22	4.4935	.81736	.17426
	PHD	28	4.9235	.76732	.14501
PV	EDD	22	4.8636	.92916	.19810
	PHD	28	5.3594	.88071	.16644
MTC	EDD	22	6.1932	.63119	.13457
	PHD	28	6.2857	.68284	.12904
COG	EDD	22	4.4470	1.25292	.26712
	PHD	28	4.8810	1.22966	.23238
MOT	EDD	22	5.7727	.85367	.18200
	PHD	28	6.1857	.83076	.15700
BEH	EDD	22	5.4636	1.22106	.26033
	PHD	28	5.7714	1.00916	.19071
CQ	EDD	22	5.3818	.83859	.17879
	PHD	28	5.7107	.80741	.15259

Figure 9. Descriptive Statistics for variables CQ and PV by degree program.



	Degree	N	Mean Rank	Sum of Ranks		PV
PV	EDD	22	20.20	444.50	Mann-Whitney U	191.500
	PHD	28	29.66	830.50	Wilcoxon W	444.500
	Total	50			Z	-2.279
					Asymp. Sig. (2-tailed)	.023

Figure 10. Mann-Whitney U test perceived value (PV) by degree program.

	Degree	N	Mean Rank	Sum of Ranks		CQ
CQ	EDD	22	22.66	498.50	Mann-Whitney U	245.500
	PHD	28	27.73	776.50	Wilcoxon W	498.500
	Total	50			Z	-1.223
					Asymp. Sig. (2-tailed)	.221

Figure 11. Mann-Whitney U test for cultural intelligence (CQ) by degree program.

**Sub-research question 4.** What is the relationship between perceptions of foreign travel's value and cultural intelligence?

Table 10

*Descriptive Statistics for Cultural Intelligence in the Data Sources*

CQ factor	Mean	SD
Metacognitive	6.25	0.6556
Cognitive	4.69	1.2463
Motivation	6.00	0.8576
Behavior	5.64	1.6592
Total	5.566	0.82934

Table 10 presents the average cultural intelligence as well as its component factors, for all participants. The metacognitive factor appears to be the sample's strongest facet of cultural intelligence as it has both the highest average score and lowest standard deviation. Although the behavior factor has the highest standard deviation, it does not have the lowest mean. The cognitive factor appears to be the sample's weakest facet of cultural intelligence measuring 4.69.

Table 11

*Descriptive Statistics for Perceived Value in the Data Sources*

PV scale	Mean	SD
Relevance	5.46	1.0774
Utility	4.73	0.8107
Total	5.14	0.9269

Table 11 presents the average total perceived value and its two subscales for the data sources. As with the preceding comparisons of perceived value by demographic feature, the mean for the relevance subscale is higher than the utility subscale. These differences, along with the cultural intelligence means warranted further statistical testing.

Using the Pearson Correlation test in SPSS, a statistically significant, to the .01 level, relationship was found between the two composite variables for perceived value (PV and Cultural Intelligence (CQ). The .412 coefficient suggests that as cultural intelligence increased so did the perceived value of the learning experience (See Figure 12).

		PV	CQ
PV	Pearson Correlation	1	.412**
	Sig. (2-tailed)		.003
	N	50	50
CQ	Pearson Correlation	.412**	1
	Sig. (2-tailed)	.003	
	N	50	50

\*\* Correlation is significant at the 0.01 level (2-tailed).

Figure 12. Pearson correlation of perceived value (PV) and Cultural Intelligence (CQ).

**Phase II Qualitative Data Analysis**

In Phase II of the study, interviews were conducted online and recorded using the Zoom platform collected qualitative data. Eight open-ended questions allowed the researcher to gain greater insight and context regarding the participants’ academic courses-based foreign travel.

More importantly, phase two of the study was utilized as a complementary phase to phase one, which included the collection of quantitative data, to allow the researcher to more fully address the research questions by explaining as well as confirming the findings derived from phase one. Participants are identified by the survey number assigned in phase I data analysis.

**Phase II participant demographics.** Of the 50 participants that complete the phase I survey, 17 volunteered for the phase II interview, however after multiple email attempts to establish contact the research was only able to arrange interviews with 12. Phase II had an equal number of males and females ( $n = 6$ ). The age groupings were equally divided, with four each, between the 30-39 age group, 40-49, and a new category of age 59 and above. All four listed destinations were among the interviewees, with China the most represented ( $n = 6$ ). Half self-reported their race as White, and the other half were people of color. A majority were pursuing Doctor of Education degrees (58.33). Although half of the interviewees had only 11-15 countries, one had been to 21 or more group (Table 12).

Table 12

*Phase II Participant Demographics*

Age	<i>n</i>	%
30 to 39 years	4	33.33
40 to 49 years	4	33.33
59 and over	4	33.33
Gender	<i>n</i>	%
Female	6	50.00
Male	6	50.00
Degree Program		
EDD	7	58.33
PHD	5	41.67

(Continued)

Countries visited	<i>n</i>	%
1 to 5 countries	2	16.67
6 to 10 countries	1	8.33
11-15 countries	6	50.00
16-20 countries	2	16.67
21 or more	1	8.33

### Answering the Research Questions (Phase II)

To address the study's research questions, the 12 participants were interviewed using a semi-structured technique with an eight-question protocol. After open coding of a sufficient number of transcripts to ensure saturation (Saldaña, 2013). The resulting codes were categorized into themes to answer each research sub-question.

**Sub-research question 1.** What are the differences, if any, between age group, gender, and ethnicity with regard to perceptions of foreign travel's value?

Qualitative interview questions that related to Research sub Question 1 included:

- What were the most beneficial and least beneficial portions of each of your trips to other countries?
- What thoughts and feelings were most prominent during your foreign travel for the 754B course?
- What were the most beneficial and least beneficial portions of your trip for the academic course?

This section summarizes the main themes from participants' responses to the open-ended questions concerning this research question. The topics associated with these questions were related to (a) nonacademic foreign travel, (b) thoughts and feelings, and (c) Academic Benefits.

***Nonacademic travel.*** The participants in this study were asked to discuss the benefits of their foreign travel not taken as part of their doctoral program. Several themes emerged as the

students identified beneficial and detrimental portions of their nonacademic foreign travel. Immersion, independence, regrets, and lack of status were among the most frequent aspects mentioned.

As the immersion theme emerged, Participant 023 stated, “I like the exposure and the culture. When I traveled, I like to really get into the interior and the culture because that’s where the people really are.” The participant also spoke about the importance of avoiding the presentation countries “put on” for tourists and finding the unfiltered or, unadulterated view of a destination. Similarly, Participant 050 described nonacademic foreign travel as “a real cultural experience” because instead of staying at a big chain hotel or resort in “some foreign country just to hang out with other American” she stayed in a more authentic lodging that was part of the local community. Participants 007 and 012 both said the most beneficial portion of their personal travels had been the ability to get immersed in the culture of a society.

But while emphasizing the importance of convenience, participant 046 said, “understanding the history of the country and being able to visit some of the landmarks and having tours of the landmarks always has really beneficial to me.” Whether the travel was to immerse in a different culture, learn something new or simply to have fun seeing another place in the world, as participants 011 and 017 discussed, the participants described the acquisition of a new perspective that they were able to carry with them into the future. Participant 051 talked about having a greater appreciation for home, upon her return from a foreign travel experience that “was more of a vacation.” In another instance, Participant 001 commented that foreign travel helped “build on the global mindset through an understanding of diversity.” Other participants shared similar assessments, but another theme on which they all agreed was that their travel was enabled by the freedom and flexibility they enjoyed as independent travelers.

With regard to independence, Participant 007 stated, “being a lone traveler, I can stay out if I want; go to bed early if needed... I challenge myself much more.” Participant 017 recalled backing through Europe with friends emphasized the pleasure of having the freedom to set her schedule. She concluded on remarks on other foreign travel by saying, “I like that because I can do what I want to do.” Participant 022 added that after returning her course-based destination without the delegation, she realized “ it's a lot easier to travel and get the authentic feel” traveling in a smaller group. Participant 022 was the only participant to mention making a subsequent visit to the destination from her course-based foreign travel. She described having the independence to have a more authentic experience without the academic obligations.

Some of the participants expressed commented on the shortcomings of their other foreign travel after having completed the academic course-based equivalent. Participant 016 stated, “I wouldn't say that I have immersed myself in a new culture as much as I would have liked.” He spoke about acquiring a “taste for checking out new cultures” in his childhood, but not fully exploring that passion as an adult. Although Participant 001 has traveled as much as he wanted, he lamented “not spending enough time in preparing to learn more about the history of a country” before or after the visit. When discussing foreign travel he had taken for work, participant 007 stated: “I didn't have much interaction with the local population at all.” Similarly, Participant 016 recalled traveling in a previous job capacity but found that he “was somewhat sheltered” during the experience by the employer.

Rather than reflecting on what they did not do, other participants discussed advantages they did not have on other foreign travels that they did or were now aware of because of the course-based travel. Participant 012 mentioned, when traveling alone, “You don't have that access that Pepperdine’s name gives you or any other institutions.” She went on to share that she

believes there are things on other travel she wasn't able to do or attend because she was not traveling under the school's banner. Participant 011 discussed his experience traveling through Europe and said: "I was there as a tourist and I didn't really have a forum to engage."

*Thoughts and feelings.* When participants were asked about their thoughts and feelings, most of the participants mentioned some degree of anxiety or excitement about foreign travel for school. Participant 007 said he had, "mixed emotions of, excitement and apprehension because I don't know what to expect." In describing his thoughts and feelings, Participant 007 stated he had traveled extensively as a lone traveler but had concerns about being in a big group like the one going to a country he had never visited before. Participant 012 added, "I didn't really know what to expect," which compounded her "anxiety about leaving the country" for the first time.

However, in discussing his excitement for the course-based foreign travel, Participant 016 said, "I was not one hundred percent sure what we were going to be doing from day to day" nevertheless he remained excited to "see a country he had never seen before." He recalled traveling with his family internationally during his formative years. Participant 022 emphasized that it was her childhood experience of moving to a new country that familiarized her with foreign travel and was "very excited" to participate in foreign travel as part of her doctoral program. Participant 044 added, his excitement came from the "optimism about "being able to try to help them with some of our skill sets and some of the things that our group was subject matter experts and bringing those to the specific charity we were working with." He also shared that he was looking forward to "exploring the country in a more in a more leisurely sense." However, Participant 046 discussed feeling anxious from "knowing that I would need to complete an assignment." The participant continued that it "put me out of my comfort zone." Subsequently adding that there were "times that were really exhilarating and felt very rewarding

in what I was accomplishing." One statement that encapsulates the emotional response to the academic course-based foreign travel experience came from Participant 051:

I didn't want to go to...I never had any interest in going and I was disappointed to find out that's where we were going. However, as I traveled and found out the things I was afraid of were really not issues. I really, really enjoyed the trip.

Other participants focused on practical or logistical matters when asked about their most prominent thoughts and feeling. In some instances, they remained connected to the anxiety-excitement continuum. For example fact, Participant 017 stated, was "excited based on a little bit of the itinerary" but still had "a little bit trepidation" about traveling to her delegation's destination. Participant 051 recalled her geopolitical concerns about the foreign travel for the course, before stating "the things I was afraid of were really weren't issues." Participant 050 mentioned the convenience of being able to "take my family with me was also appealing." The comfort it afforded enabled her to stay "focused on being observant on things that I could possibly write about and turn into something that could get published."

In other instances, comfort was expressed as in the words of Participant 001 as "relaxing" and being able to enjoy the community. " Participant 023 stated "we were more relaxed and more informal" when discussing his most prominent thoughts. He went on to exclaim that they were on the literal other side of the world." Both Participant 011 and 023 emphasized the aspect of being somewhere "different." Participant 011 added "it's definitely different. It's a different culture, different environment." He continued that he found it "interesting, that although we were in another country, part of the educational benefit was being with multiple cohorts because I found my experience has been that I learned as much, if not more, from my classmates."



*Academic benefits.* As the participants discussed the components of their course-based foreign travel that they felt were most beneficial, several themes emerged regarding the various opportunities afforded to the doctoral students as they participated in the experience. Peer learning, cultural exposure, design issues, and duration were among the most frequent topics mentioned. Subtle yet important differences did emerge in how participants discussed the same themes.

As the peer-learning theme emerged, Participant 011 stated, “the most academically beneficial portion was all the reports that my classmates did on various aspects of China” Suggesting that the benefits even after returning from the foreign travel even some of the work they did after they came back was helpful. But Participant 050 explained that it was “The projects that we did prior to [departing] I think really helped shape and prepare me.” In addition to learning from classmates, Participant 001 expressed the idea that “The most beneficial was definitely learning more about a diverse culture that I had never experienced before.” But he also addressed the lack of academic structure as a missed opportunity. After concurring on the benefits of the experience of being in a new country, Participant 046 commented on the lack of a robust academic plan. She noted that “there could have been a little bit more formal instruction in terms of some of the concepts that we had to apply to our project and maybe a little bit more discussion about those theories before then we went to apply them. She elaborated on the advantages of being able to talk with other doctoral students engaging in the same type of activity to learn what they were doing and share perspectives about their experiences.

However, cultural exposure was another theme to emerge from the participants. Participant 012 stated “the most beneficial pieces to me were always the cultural components.” She described how “traveling through the towns and through of the different areas of China on

the bus, we were really able to see, nuances, like how they buried their people or divided the land.” Participant 007 emphasized that it was most beneficial to get to know the culture and the history of the people and the traditions.” However, he noted that the least beneficial “thing in course-based foreign travel would be that you have only a couple of days in certain places, and it's kind of hard to really get to know the place in a couple of days. Elsewhere, despite the brevity of the foreign travel, Participant 016 observed:

There were very few stoplights. The people just kind of flowed on their own. There was a lot of honking, but it was never in anger that I could tell it was always about here I am. Don't run over me. It was like a communication device rather than like expressing anger. Which was fascinating, and I kept thinking about that is like a metaphor for how that country.

The items on the itinerary emerged as a theme that could be positive or negative. On the matter of activity selection, Participant 007 noted while discussing the program leaders “they took the time to see what our specific interests were that showed me, someone was listening to the needs of the class.” But, Participant 017 emphasized the importance of participants having autonomy and options during foreign travel. She also did not think the course-based foreign travel had a lot of beneficial parts and ultimately it “felt like it was more of a tourist excursion.” While Participant 022 felt that all aspect of the foreign travel course were beneficial, she also added: “we should have visited a lot more universities and maybe have some of the graduate students share their research efforts with us.” Participant 023 added that the most beneficial parts of the foreign travel were site visits to places like the embassy and various businesses. But “wished things could have been planned a little differently or done at a time when the delegation was more refreshed. He concluded that they were “almost to the point where we're packing in too

much.” Participant 044 mentioned that being able to relax on the foreign travel allowed him the space to practice applying theories to the real world.

**Ethnicity.** Although one participant (012) had no foreign travel experience before the 754B course and provided no data on the first theme – nonacademic foreign travel, there was a thematic consensus among the other participants across ethnic groups. However, one exception was on the matter of regrets from other foreign travel. There were no people of color that expressed regrets. Another notable difference was, as a percentage of comments offered, interviewees identifying as Black or African American expressed more excitement than anxiety, whereas the opposite was true for other ethnicities (see Figure 13).

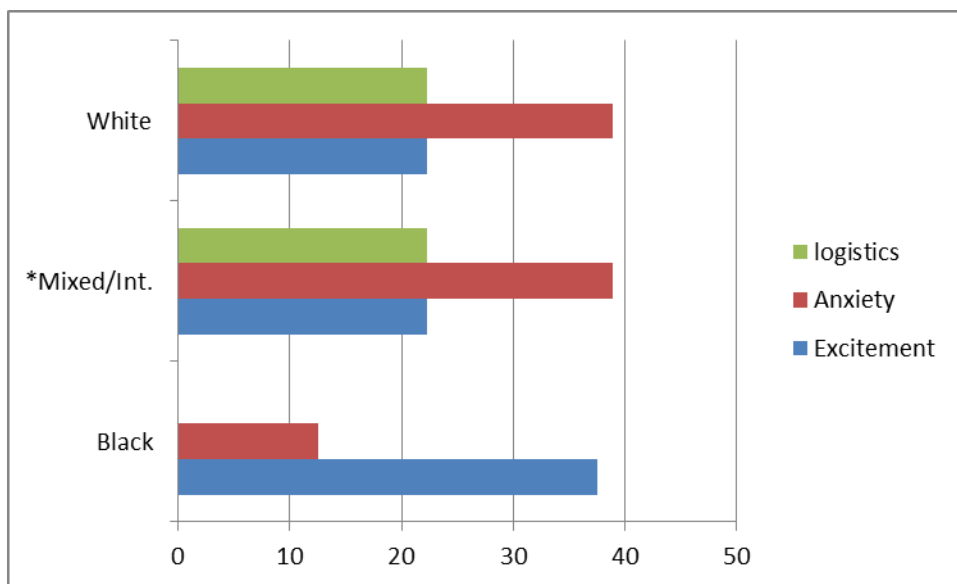


Figure 13. Percentage of thoughts and feelings by ethnicity.

**Gender.** There were few differences between the genders. There was a thematic consensus among the participants about the emotions and learning opportunities on their course-based foreign travel; however, the degree to which males and females talked about the theme (i.e., codes) was different. For example, both genders made the same number of statements about being anxious, but as a percentage of total statements, males offered nearly double the females (see Figure 14). But males gave more statements about exposure as a benefit of the foreign travel

course than their female counterparts only to have the percentage of statements made nearly equal (see figure 15).

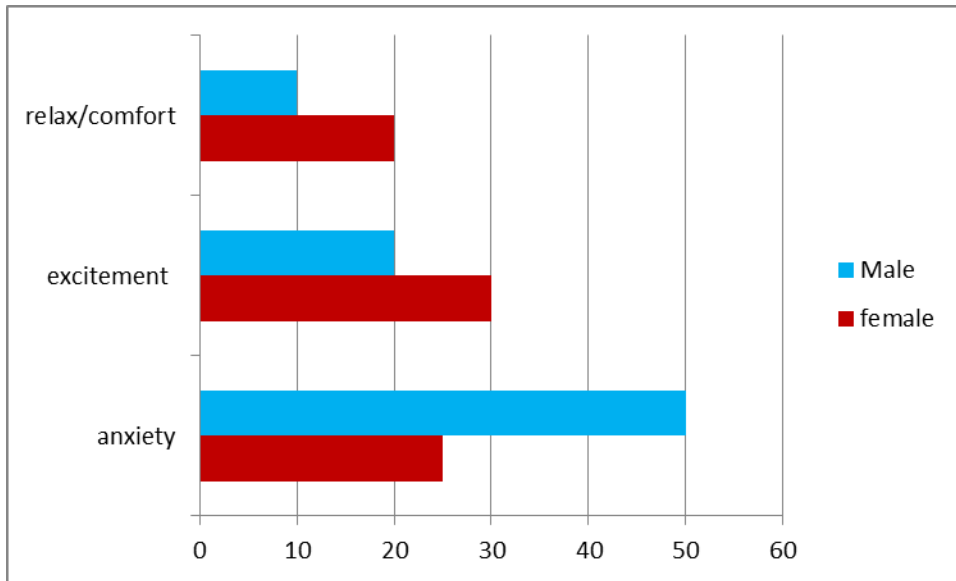


Figure 14. Percentage of thoughts and feelings statements made by gender.

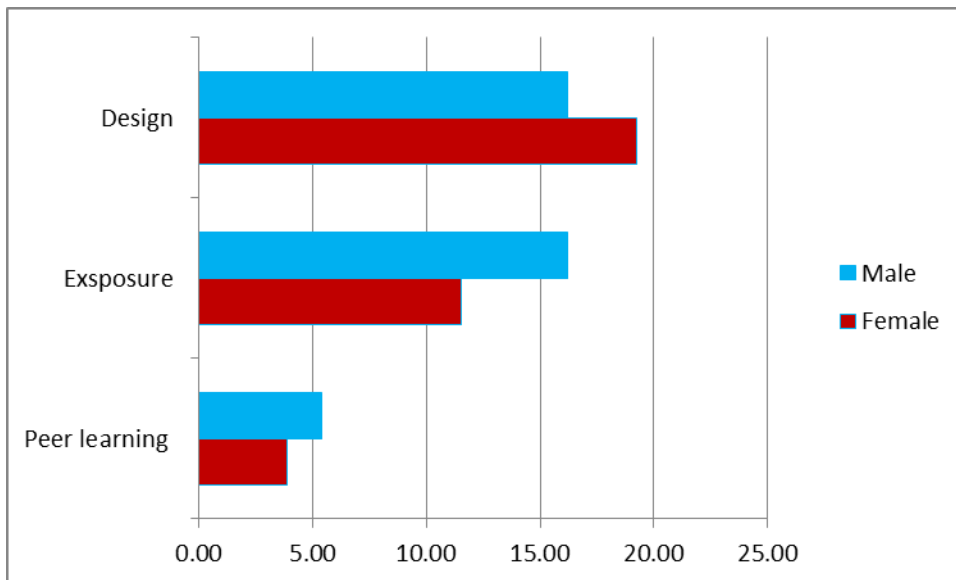


Figure 15. Beneficial portions of course-based travel by gender.

**Age.** Participants in their 40s were more anxious as a percentage of statements made than their younger and older colleagues (see Figure 16). However, they had less to say about the design issues than their colleagues (see Figure 17).

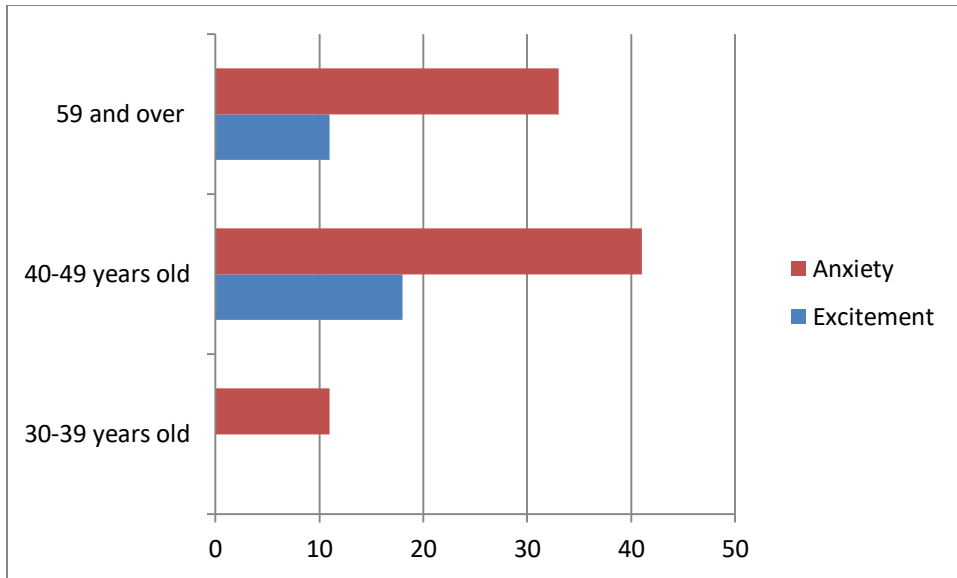


Figure 16. Percentage of thoughts and feelings statements made by age group.

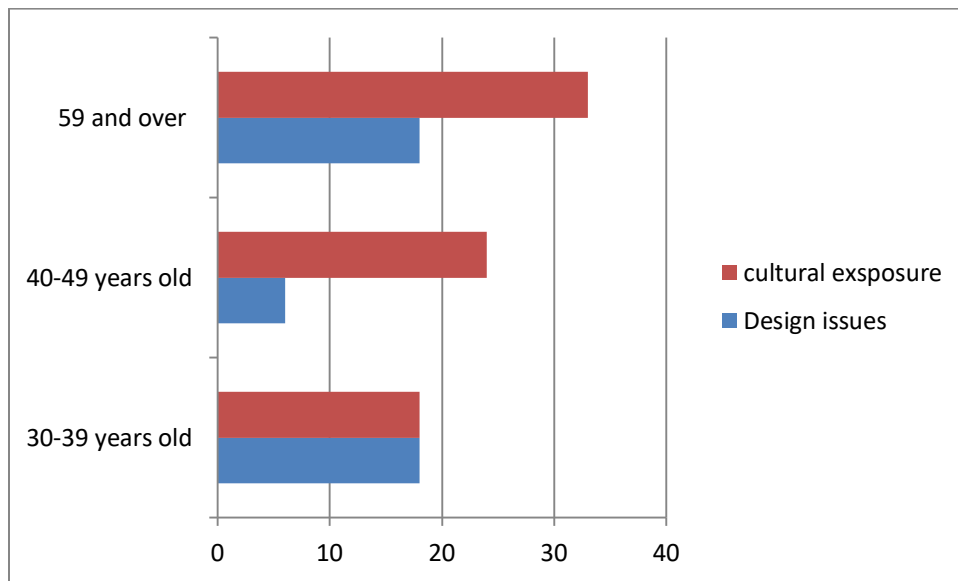


Figure 17. Statements made on cultural exposure and design issues by age group.

**Sub-research question 2.** What is the relationship between foreign travel destination and perceptions of foreign travel's value?

Qualitative interview questions that related to Research sub Question 2 included:

- What were the most beneficial and least beneficial portions of your trip for the academic course?

- How would you characterize your interactions with the local population in the foreign destination?

This section summarizes the main themes from participants' responses to open-ended questions pertaining to this research question. The topics associated with these questions were related to academic foreign travel, and contact with locals (on the academic foreign travel).

*Academic hindrances.* Just as logistics were a theme among the thoughts and feelings of the participants, they played a role in the experiences in each destination. For example, Participant 023 found the overall “planning implementation of it – very well done and very productive,” particularly transportation. In another display of opposites, Participant 046 relayed the dilemmas involved with coordinating foreign travel for an academic course when there's no prescribed itinerary. She went on to later say that her enjoyment of the foreign travel for the course has led her to engage in more prescribed travel in the future – a departure from her past practice.

As the logistics theme shifted to an emphasis on the rigor of the scheduling during the foreign travel, it manifested as two polar extremes. For example, Participant 012 said she was exhausted, and everyone from her delegation was fell asleep on the bus, and Participant 016 described the experience as a “Whirlwind.” He recalled “hardly even have time to rest” after a long flight before rushing off to their delegation's first activity. He went on to say it would have been helpful to have time for reflection before rushing off to the next item on the itinerary. He went on to describe the itinerary as a mixed bag. There were parts beneficial to his learning interests and others he enjoyed. Elsewhere, Participant 001 stated his foreign travel for the course “very relaxing” Others, like Participant 016 recalled “hardly even have time to rest” after a long flight before rushing off to their delegation's first activity. He went on to say it would have been

helpful to have time for reflection before rushing off to the next item on the itinerary. Likewise, Participant 023, in a different destination felt the fatigue having such an impact that members were not fully able to absorb a cultural performance they went to see.

Lastly, a point of more nuanced consensus was around the organization. It was often just a matter of perspective. For instance, Participant 022 said it needed “a little bit more organization,” while Participant 044 called it “a little bit disorganized.” However, both discussed the role of built-in free-time during the foreign travel. For example, Participant 022 said “what I thought was really good was that they kind of gave us down-time to go out and explore.”

Similarly, Participant 044 stated:

We did drive to the capital and I can't remember the name of the capital. It's not Belize city. It's a different place and belief cities, very dangerous city. But the capital is not what we were not scared of, but just, you know, cautious as we drove in the back roads.

Conversely, Participant 016 commented that “having a better idea about how just how much we would be moving - a rough breakdown of each day would have been helpful, ahead of time for me, anyway.”

**Local contact.** The participants in this study were asked to discuss their interactions with the local population in the destination they traveled to for the academic course requirement. Several themes emerged in regards to the intergroup contact the doctoral students identified as characteristic of their encounters. Among the most common features were: frequency, nature, and purpose, of the contact.

As the frequency issue emerged it manifested as two polar extremes, which led to scenarios in which Participant 007 could sum up his contact with one word - limited, while Participant 046 explained that her foreign travel for the course had her talking to random

strangers in coffee shops and leaving her “so touched by how they wanted to talk with us. And they wanted to share their stories.” the open and friendly nature of the encounters was not universal for the interviewees. For example, both Participant 016 and Participant 051 described their tour guides and others in two different destinations as “guarded” for fear of saying something impolitic regarding the authority figures in power. They went on to say it was possible to get some locals to open up a bit away from the larger delegation. Likewise, their colleague, Participant 017, in a different destination found that the one on one conversations to be much more productive in terms of relaying and receiving information otherwise unknown outside the country. However, Participant 022 was not able to maintain the contact for after the delegation returned home, which was expressed by multiple participants.

Participant 023 summarized some of the participants’ experience when he stated: “I did not have any adverse experiences. But you can tell that there were some who were experiencing Americans for the first time.” Participant 012 “commented that “there was some curiosity with brown people...the touching of the curls and things like that and wanting to take pictures with us.” In recalling her observations, she emphasized that the curiosity of the local population was the only thing that stood out to her. Participant 017 added, “it became tiring after a while” as the locals had no problem coming up to me and trying to touch me, coming up taking pictures. In discussing his encounter, Participant 016, found it interesting that he and another “fair skinned” member of his delegation had individuals and families walk up and have their picture taken with them. Despite the different ethnicities and genders involved none of the participants described the boundary issues as detrimental to the overall value of the foreign travel.



Despite the different itineraries in of each destination, the purpose of the contact with the local populations was often related back to personal interests by the participants. For example, Participant 046 stated:

We had a really great opportunity to speak to a lot of locals, but to maybe have a formal meeting at the ministry, one of the ministry's Minister of Health or Ministry of Education, Maybe to even have a local speaker that might have been representative from something like that. I think that that would have added to it.

Similarly, Participant 016 commented “I enjoyed meeting with some places, like, at the consulate and the embassy and talking to those people. I didn't care so much about some of the business side of things. Elsewhere, Participant 050 said: “my interactions with the local population was very fruitful for the research that I was doing, but also extremely eye opening and just all around a great experience for from an educational standpoint.”

*Destination differences.* Although there was thematic consistency among the participants about the themes related to the benefit of the travel and contact with the local population for students across destinations, there were subtle differences in the extent to which certain themes were emphasized. However, as some destinations only had one participant visit, a comparison may distort the presentation of the experience in that locale. Nevertheless, it seems that the destinations where participants had more to say, as a percentage of statements made, about the rigors of logistics and scheduling also have interactions with the local population that were more guarded or limited. Conversely, when contact with the local population was more frequently described as friendly and abundant, comments about the scheduling were replaced by statements about comfort and relaxation.

**Sub-research question 3.** What are the differences, if any, between the Doctor of Education and Doctor of Philosophy students' perceptions?

Qualitative interview questions that related to Research sub Question 3 included:

- How did the lessons learned during your foreign travel compare to what you have learned about leadership in other course settings during your doctoral program?
- How would you assess your performance during the various activities and site visits during your foreign travel for the 754B course?

This section summarizes the main themes from participants' responses to the open-ended questions related to this research question. The major topics connected with these questions were related to lessons learned and performance assessment.

*Lessons learned.* The participants in this study were asked to compare their foreign travel to experience to the rest of their doctoral program. Several themes emerged in regards to the lessons learned abroad compared to the classroom. Theory-to-practice, symmetry, collaboration were among the most frequent lessons mentioned.

As the theory-to-practice theme emerged, Participant 007 commented on his foreign travel experience by saying, "it was putting the dots together between theory and practice that made it special." he also mentioned how it provided a space for "applying some of the theories, some of the technique that we learned about in our book." Participant 012 described it as a means for "contextualizing" concepts that were not particularly accessible via the textbooks. Participant 001 focused on the broader intent of the program, not a specific activity. He stated, "We're studying leadership, and we're also becoming leaders at the same time." While speaking about the intrinsic nature of the discipline, he added: "I think that that's what's unique about leadership, the stuff we learn in the classroom we could go in use during the program."

Concerning the issue of symmetry, Participant 022 suggested the concepts learned in class were observed while abroad and said “what we learned while in China can be applicable to what we discuss in class.” She described the lessons as “different,” but concluded, “they flow in parallel to each other.” While agreeing that the lessons learned in each setting were different, Participant 017 among others said that there was a “disconnect” between the other parts of the doctoral program and the foreign travel experience. She went on to emphasize that there was “essentially never an opportunity to really practice exercise leadership or ethics, or concepts from that.” Still others, like Participant 011 rejected the premise of the question, suggesting that they could or needed not to be compared. He said “I’m not sure I can say I learned something radically different. I think it from my perspective, it more attached to me.” Participant 050 discussed the importance of “independent learning in a doctoral program” and considered foreign travel as an extension of that principle. She shared that while away she had the freedom “to put into practice the cultural sensitivities,” which she found interesting. Many participants mentioned that as the delegations came together for their travel, it was the first time many of them had met their colleagues.

Collaboration was mentioned throughout the interviews as a point of comparison to the rest of the doctoral program. Participant 051 described, they had the commonality of the school, some were Doctor of Education others were Doctor of Philosophy, but they were all thousands of miles from home confronting the same challenges. In describing the lessons learned from the academic foreign travel Participant 051 stated: “it gave us a chance to kind of meet and get acquainted with people from the other program to share goals and experiences.” In a more general sense, Participant 011 added: “In our doctoral program, we learn a lot, but part of it, what you take away, it really depends on your cohort.” The participants all conveyed the idea that the

cross-program interaction was a positive development. It gave some the opportunity to learn from and share with individuals that they would otherwise not have met, despite delegations visiting different destinations, typically under very different environmental conditions.

Participant 050 stated that “true colors” surface as people have to perform under pressure stripped of all the convenience of home.

However, Participant 017 noted that not everyone performs under pressure and a few tardy delegation members can hinder the plans of the entire group. Or as Participant 016 suggested even a few punctual group members can lead the delegation into “groupthink.” Although there was some disagreement on the degree to which it occurred, the participants generally held that their foreign travel creates a space for them to put their other doctoral lessons into practice.

***Performance assessment.*** The participants in this study were asked to assess their performance during the various activities on their academic foreign travel. Several themes emerged regarding assessments the doctoral students assigned themselves for their performance. Professional or scholastic applicability, personal growth, and engagement were the primary measures used.

As the applicability theme emerged, using an academic grade scale to assess his performance, Participant 044 said, “I give it a B because we were able to bring a little bit of value at a tiny bit of value to [the foreign organization they assisted].” In describing his contribution, Participant 044 concluded that he might have been more helpful to an organization in greater distress, but gained useful insight on what he termed the medium picture. Participant 046 was able to present the work she completed during the course travel “several times at some conferences so professionally; it was very beneficial.” Moreover, she emphasized that other

members of her delegation were able to benefit professionally as well in the form of recognition and grant support for their project. Other participants also won recognition for their work.

Participant 001 said, “I would say that I performed pretty well, but my partner and I ended up winning the competition.” In discussing her academic foreign travel, Participant 050 declared, “I was most focused on being observant on things that I could possibly write about and...that could get published.”

The tangible considerations for personal advancement were also a source of motivation for Participant 017, who mentioned taking time to pack business cards for engagement opportunities, though they did not materialize as anticipated. Initially, she had been “excited based on a little bit of the itinerary.” However, Participant 050 said: “I enjoyed the balance of activities with free time so that we could really have some balance...it is important, I think, to be mindful” Numerous participants used the word engaged when asked to assess their performance. But Participant 023 may have epitomized their sentiment with the statement: “I did not miss anything. I was engaged and timely for all events. You know, I got the essence out of each event that we attended.”

As for personal growth, Participant 016, in describing, his delegations activities, said, “I used each of the experiences to help kind of shave, to prune my thinking.” After a misunderstanding involving a key concept from his presentation to a group of foreign scholars, he came to realize “when you're going to a new country, region, or culture. ...assumptions are going to get challenged. And as long, as I'm making a genuine effort to understand where they're coming from it, I've had no problem.” Participant 001 described how with the assistance of one of his colleague on the delegation, the experience “opened me up out of my shell a bit.” He was able to conclude “I performed pretty well,” and said he learned “it doesn't matter how you go

into a project. It matters how you handle yourself while you're in the project.” In some instances, the growth extends beyond academic or professional applications. Referring to the academic course foreign travel, Participant 050 stated, “after this, I took another trip and engaged in a lot more conversation with the local people and asked a lot of more curious questions.” All of the participants described themselves as engaged or open to the process during the site visits and activities during the foreign travel, regardless of demographic, destination or degree program.

*Degree differences.* Although there was thematic consensus among the participants about the themes related to the lessons learned and performance assessments for students in both degree programs, the differences lay in the extent to which certain themes were emphasized. While Doctor of Education and Doctor of Philosophy students made the same total number of statements related to themes for lessons learned, the distribution of those statements across the themes was different. As a percentage of statements made, Doctor of Education students said more about applying theory to practice (46%) but Doctor of Philosophy students offered more unaligned or miscellaneous comments (31%). Similarly, when assessing their performance, a greater percentage of Doctor of Philosophy student comments (31%) addressed the applicability of their foreign travel experience to their professional or scholastic lives than did their Doctor of Education counterparts (5%). Figure 19 demonstrates the distribution of codes across themes for lessons learned for participants in both programs and Figure 18 contains the distribution of codes across themes for performance assessment for participants in both programs.

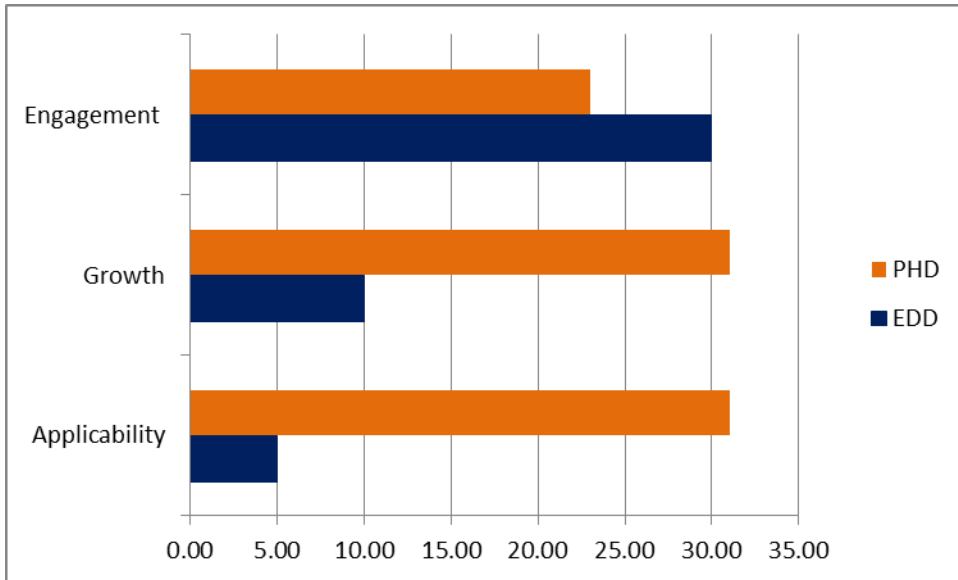


Figure 18. Performance assessment focuses by degree type.

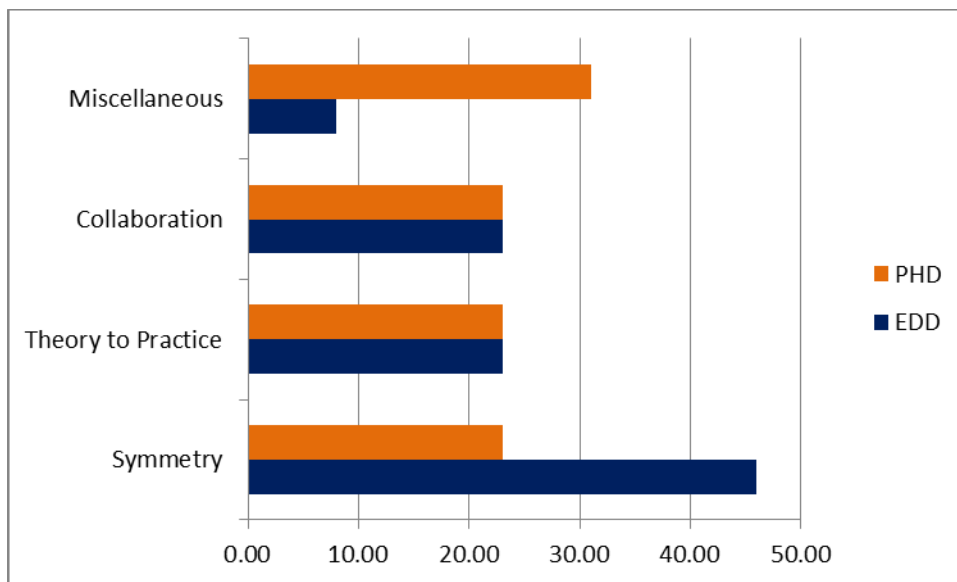


Figure 19. Lessons learned emphasis by degree type.

**Sub-research question 4.** What is the relationship between perceptions of foreign travel’s value and cultural intelligence?

Qualitative interview questions that related to Research sub Question 4 included:

- Please address anything that we have not covered in the preceding several questions that you would like to share with me about your experience.

- What, if any, capabilities did you feel were developed during or because of your foreign travel in the 754B course?

This section summarizes the main themes from participants' responses to the open-ended concerning this research question. The major topics associated with these questions were related to perceived value and cultural intelligence.

***Capabilities developed.*** The participants in this study were asked to discuss the capabilities that they felt were developed or enhanced because of their participation in the short-term course-based foreign travel. Several strategies and motivations emerged in regards to capabilities the doctoral students hone via foreign travel. Cultural competence, adaptability, and a global mindset were among the most frequent areas of development mentioned.

As the cultural competence theme emerged, Participant 016 said of the foreign travel course "it helped me to be less ethnocentric." He also spoke about a desire to travel more and see new cultures. He added, "I desire to take my family to live in a foreign country." In describing his appreciation of other cultures, Participant 007 added it was "intense trying to learn so much in such a short period of time," but believed he understood more about life in a country he had previously never visited than he did before. The foreign travel resulted in him "knowing more about a country" than he "would have known to research in a book or online." He added "it changed his perspective" and that he now "could understand why they were so proud of their culture." Participant 007 ultimately concluded:

People in other countries are just the same as we are. They like to have fun. They like to talk to, to get to know people. They're intelligent. They're passionate. People are really the same when you come down, get down to it.



Concerning the adaptability issue, Participant 001 stated “I realized you don’t keep a sit on the sidelines type of attitude,” after some initial reluctance to participate in the foreign travel. Participant 017, after being disappointed regarding elements of the foreign travel course plan stated, how the experience helped her learn to “navigate distractions” and remain focused on the bigger picture. Participant 007 commented that he learned to be comfortable with being uncomfortable. With a more practical perspective on adapting, Participant 023 stated that he “learned additional” skills in traveling,” although it was not his first foreign excursion.

Developing a global mindset was mentioned by multiple participants as an element of course-based foreign travel. Participant 046 stated the foreign travel was “helping the students from this country going there to develop a global mindset.” She spoke about her time working with colleagues on a project that could help countries across the developing world. Participant 022 noted that the experience was not just about helping the developing world. She described her time in “a city as cosmopolitan and modern as anywhere else,” as instructive. Ultimately, concluding that countries are catching up or further along than originally thought. Participant 011 encapsulated the essence of what the participants shared when he said “people around the world are similar. We may have different cultures and different reasons for [doing] what we do, but things like anger, happiness or love, and fear...those things are universal.” He also expressed what he believed is a shared hope for hopes and dreams for everyone’s children and future.

***Unanticipated discoveries.*** Participants in this study had an opportunity to discuss matters that were not elicited by the researcher’s interview protocol. Two topics addressed by multiple participants were family as a motivating factor and, a critical analysis of the image presented by the destination country. A latent current in many of the recommendations

participants shared regarding the academic course-based foreign travel echoed the themes of social innovation.

As discussed previously, Participant 050 selected her destination for the foreign travel course based in part on the feasibility of bringing her family along. Participant 001 had to leave a young child at home for foreign travel. He spoke about making the most of the situation by saying, “I was a little reluctant to go on this trip to start. But once I got there and... [engaged with colleagues],” their project became his focus. He added that engaging in the work even though distracted with family concerns kept him focused. Participant 016 shared a similar commitment to maximizing the value of the travel because his family was not able to travel to his destination. He stated, “I wanted to be sure that I got as much out of it as I could. So I didn't want to waste my time since my family was also sacrificing so much for me to go.” But family as a motivating factor was not the only unanticipated discovery and possibly not one possible for all participants. Although participants had a generally positive opinion of their experience, some engaged in critical analysis of the presentation that confronted them.

Operating at the nexus of family and critical analysis, Participant 050 recalled:

People travel to Belize just to see the Mayan ruins. And yet you can't go to school in Belize and learn only in the Mayan tongue. You have to learn in English. And so if you're from the Mayan culture, I can't imagine if somebody says, as an American mom, I had to send my child to a school that spoke a language that I don't speak. I just can't imagine that. So I really think the things that I was researching, I really got to see firsthand.

In other instances, the participants questioned the image of the destination with which they were presented. For example, Participant 011 recalled “riding in the bus pass vacant high-rises and wondering what the future holds for the country” and later “wondering if the

government had swept up all the homeless people before [the delegation] arrived at a tourist site.” All Participant 016 could think of when reflecting on one of his stops during the foreign travel, was that the city “was just so shiny” compared to what he heard from the tour guide and read in pre-departure independent research. However, in addition to questioning what was observed, Participant 051 was critical of the verbal messages conveyed during the academic foreign travel, by recalling: “I didn't feel I had anything to compare it to, to really understand what level of truth there was to it in what level of propaganda there is to it.”

As the participants offered recommendations for enhancing the academic course-based foreign travel experience in their doctoral program, some elements found in the literature on social innovation began to emerge, although none of the participants explicitly used the term social innovation, it permeated their comments. It is not surprising that the participants did not use the term social innovation. In fact, the field has “yet to coalesce around a single, common definition, a set of standards or performance measures or an agreed policy agenda” (Nicholls et al., 2015, p. 1) However, most of the recommendations were related to the aspects that the respective participants found most beneficial. Nevertheless, the levels of impact, the value creation dilemma, and personal agency were among the most salient aspects of social innovation mentioned.

Participant 022 suggested “we should have visited a lot more universities. Maybe have some of the graduate students share with us what their research efforts are, what they're doing and just kind of getting some experiences from their academics”. Or as Participant 044 offered from other destination, the foreign travel course should be an opportunity to “build a sort of structure there to host more comprehensive programs and maybe even partner with other schools to make that a cool center of learning.” Social innovation can be conceptualized as in terms of its

process or outcomes. Processes focus on relationships between innovators that ultimately lead to social change. Shifts in roles and relationships are one of the primary contemporary social innovations (Phills, Deiglmeier, & Miller, 2008).

However, after successfully implementing a new program with business and other local service providers, Participant 046 returned from the foreign travel wondering “why were those other projects not implemented.” The lingering questions in the minds of participants were not always the result of success abroad. In fact, Participant 050 still “felt guilty in a lot of ways for the taste that I left in the mouth of the locals.” Ultimately the reason for the guilt was as Participant 046 stated: “we had a great project and we had a lot of interaction with locals and asked a lot of questions - got to know people and posted information on social media. And then when we didn't move forward after the trip” the reflections of participants 046 and 050 reflect the scarcely articulated reality of social innovation – it will create value for some, but not all. According to Nicholls, Simon, and Gabriel (2015) this dilemma “is well understood within innovation studies” (p. 5). They rely on Schumpeter’s (1942) notion of ‘creative destruction’ for theoretical support.

Finally, as some of the participants described the lasting impact of their experience on themselves as individuals, the three types of agency in social innovation were illuminated. McGowan and Westley (2015) label the person that first expresses the new idea or phenomena, the poet. In this study, Participant 051 displayed some poetic qualities. In describing how beneficial it was to see “one person had invested his own resource is to opening up things for the community,” she began to discuss the broader potential geopolitical ramifications of such endeavors. While the poet may not necessarily be involved with the social innovation process after identifying it, the designer converts those observations into programs, policies, or products.

When Participant 023 discussed potential new policy solutions regarding his topic of interest – education, it stemmed from on observations (e.g., no elevators) and discussions about internships and apprenticeships.

Further, he suggested that while he has no immediate desire to retire, he was struck by the sight of “seniors in the parks ... not chasing dollars in some rat race type of hectic pace. The resulting musing about whether “it may be something that they might want to look at here in the States,” harkens back to the innovation designer McGowan and Westley (2015) described. As participants 044 and 050 commented on the efficacy of the successful projects they observed from their foreign travel, the final type of agency manifested. McGowan and Westley (2015) label the debtor as a person promotes adoption and diffusion of the designers’ innovation.

## **Summary**

Chapter Four has described the research data and the analyses performed on it for both phases of this sequential mixed methods study. First, the quantitative data were presented and analyzed using various statistical procedures to answer the research sub-questions. Subsequently, interview data were coded and thematically categorized based on commonalities in responses to provide complimentary answers to the research sub-questions. Data analysis yielded a total of 23 unique themes across the four Sub-research questions. Table 13 provides a summary of all the themes obtained through the data analysis.

This study’s concluding the fifth chapter will summarize the results, highlight the key findings, and recommend paths for future research based upon of this study. The commentary addresses unexpected observations and gives general conclusions related to this study.

Implications of this study to global leadership theory, social innovation, and international education are offered to guide researchers and practitioners on possible uses of this research.

The dissertation closes with the principal researcher’s final thoughts on the process and a forecast for the future of these disciplines, theories, and movements.

Table 13

*Summary of Themes for Sub-Research Questions*

SQ1.Perceived Value and Demographics	SQ2.Perceived Value and Destination	SQ3.Perceived Value and Degree	SQ4.Perceived Value and CQ
Immersion	Scheduling	Theory to Practice	Cultural competence
Independence			Adaptability
		Symmetry	
Regrets	Transportation		Global mindset
		Personal growth	development
Lack of status			Social innovation
Anxiety/Excitement			
	Frequency		
Peer learning		Professional/Scholastic	
	Nature	Applicability	
Design issues	Purpose		
Cultural competence			

## **Chapter 5: Discussion**

This study sought to explore academic course-based foreign travel in the development of global leadership expertise, in light of recent trends in trends in the field of higher education, particularly the areas of study abroad, global leadership and social innovation. This final chapter summarizes how and why the data were gathered and analyzed, as well as the conclusions and recommendations they inform. After a review of the key findings, their implications will guide a discussion of recommendations to relevant institutions and possible future research options. The chapter concludes with the researcher's final thoughts on the conception, implementation, and execution of this study.

### **Research Purpose and Questions**

The purpose of this study was to examine how doctoral students perceive the value of short-term course-based foreign travel. This study was intended to strengthen the theoretical foundation of contemporary practices and trends in higher education by explaining the perceived utility and relevance (i.e., value) of learning experiences in a foreign travel context. The study focused on answering the following research question:

In the opinion of doctoral-level leadership students, what are the aspects of academic course-based foreign travel that contribute to the development of global leadership skills? To more fully answer that question, the study sought investigated the following research sub-questions:

1. What are the differences, if any, between age group, gender, and ethnicity with regard to perceptions of foreign travel's value?
2. What is the relationship between foreign travel destination and perceptions of foreign travel's value?

3. What are the differences, if any, between the Doctor of Education and Doctor of Philosophy students' perceptions?
4. What is the relationship between perceptions of foreign travel's value and cultural intelligence?

### **Loop Back to the Literature**

The literature informing this study on the value of short-term, academic course-based foreign travel began as an exploration of the broader topic of global leadership theory. As a burgeoning discipline, there was not an extensive body of established research available on global leadership. However, there was a clear line of demarcation between it and the traditional field of Leadership. Through a thorough review of the literature, evidence emerged of a growing trend advancing the development of global leadership practice within academia. As with every setting in which it exists, the measurement and definition of this nascent field proved elusive. However, research on cultural intelligence revealed some predictive ability for identifying global leaders. The resulting confluence between global leadership advocates, trends in higher education namely the increase in short-term study abroad, along with calls for Social Innovation Education combined to form a small but sufficient amount of literature, and enough unanswered questions on these trends emerged to build a premise for this study.

As the trajectory of the literature review developed, the relevant topics of interest rested primarily on: foreign travel in education (i.e., study abroad), learning theory, Global Leader Development, cultural intelligence, and Social Innovation. Further, the review revealed a tradition within the host institution of advancing this research thread in successive studies. The research tradition and scholarly publications combined to provide a general guiding framework for the research study.



Decades before D. Kolb (1984) would present his experiential learning theory, John Dewey (1938) was one of the first to propose the idea that the value of a learning experience comes from the effects it has on a learner both immediately and in the future. Whereas Dewey was primarily concerned with learners having learning experiences that would prepare them for successful participation in society, Freire's (1970) challenge to the education system focused on learning experiences that would liberate learners and prepare them to transform society. When Malcolm Knowles (2012) presented andragogy as a theory for adult learning, he noted that they wanted to learn things that would help them effectively cope with real-life situations. In short, learning had to be relevant. This study highlighted both the value and relevance of global learning experiences for doctoral leadership students. Moreover, it demonstrated through connections to the literature on value creation in social innovations (Ramirez, 1999) and learning as a social value (Yee et al., 2019) how global learning experiences can be part of the growing body of research (Ville & Pol, 2009; Nicholls, Simon, & Gabriel, 2015; van der Have & Rubalcaba, 2016) on social innovation.

The researcher may pursue future linkage with scholars and institutions referenced in this section and the literature review as well as with those who may wish to continue the research with this population just as the present study builds upon its predecessors (Moodian, 2008; Clayton, 2016). Geoff Mulgan, an accomplished author, and pioneer in the field of social innovation has published and presented extensively on the potential and theoretical foundations of social innovation. Additionally, David Livermore has numerous publications related to the utility of cultural intelligence in the modern world for driving innovation and global leadership. Joyce Osland has also contributed immensely to the literature in area global leadership. Finally, for the last century, the Institute of International Education has provided resources, studies, and

that have helped education and educators that transcends national borders, including its open door reports which contain a wealth of information on international students in the United States as well as US students studying abroad.

### **Research Design and Methodology**

This research used a sequential explanatory mixed methods approach, which involved gathering quantitative data via an online survey, followed by conducting qualitative interviews with a subset of the survey takers. Fifty doctoral students completed the survey and twelve of them completed follow-up interviews. To complete the study each student had to complete the online survey and provide their contact information to volunteer for a recorded online interview. Most of the questions solicited the student's perceptions and reflections about their short-term course-based foreign travel experience. The approach was explanatory, rather than exploratory, to help interpret and contextualize the results derived from existing instruments.

Semi-structured one-on-one interviews followed the collection of the quantitative survey data. While the survey data were analyzed using descriptive and some inferential statistics using SPSS, manual content analysis was used on the interview data. The data from the second phase of the research were coded and categorized into themes that helped explain the survey results. Taken together the data connected to aspects of the literature that a single phase would not have independently.

### **Data Source**

The data source used for this study was composed of doctoral students in the Leadership Studies Department at a single university. Some were becoming Doctors of Education, others Doctors of Philosophy. All had participated in a short-term course-based foreign travel experience as part of their degree program.

## **Assumptions and Resolutions**

This research began, operating under a set of core assumptions. They were presented in the opening chapter and relisted and evaluated here in the concluding chapter. Each original assumption is listed and followed by a data-driven resolution in the following section.

### **1. The study will be inviting to potential participants**

Although the survey response rate was lower than expected based on guidelines in the literature (Baruch & Holton, 2008), the volunteer rate for phase II exceeded expectations, despite the anticipated time commitment presented to participants (i.e., three times as long as the survey). The result was a 50% increase in the number of participants interviewed compared to the original target. However, the incompleteness rate suggests that the usability test conducted before the distribution of the survey instrument may have needed an additional round or set of testers. Moreover, administrative delays impacting the solicitation phase suggests that scheduling rather than the instrument itself may have been a factor.

### **2. Participants will be open and honest**

The participants were assured of their confidentiality in writing before scheduling the interview and again at the beginning of it, before answering any questions. Given their commitment to both phases of the study, it seems more than plausible that they were open and honest. Additionally, most of the interview participants how valuable they thought the reach could be to the future of the institution, further reducing the possibility that they were dishonest.

### **3. Participants will have useful data to offer**

The doctoral students in this study identified relevant and timely themes related to the value derived from academic- course-based short-term foreign travel. Though they used different key phrases and anecdotes, the similarity among their responses created overarching themes that

captured the essence of the experience beyond demographics, destination or degree program. However, there were useful or important features that a minority of the sample expressed. Such nuances are just as useful data points. The assumption accounted for the possibility that some participants would have outlier experiences. The findings suggest that foreign travel experience is not universal, but the context has something for everyone.

4. Academic course-based travel to a country another country will not inherently lead to a desire to live or work there in the future

While participants may or may not want to live or work in a foreign destination long-term, several interview participants expressed that they would like to revisit their destination, or wanted an opportunity to do more work (academic and professional) while they were there for the short-term travel. In short, this assumption needs refine to include a time frame but is inconclusive as initially conceived.

5. Travel can increase or decrease affinity for a given country

The doctoral students expressed having a greater understanding of the people and places they visited, upon their return home, which led some to change their perspective on the destination. Depending on the destination participants questioned the validity of what they saw or were impressed. This assumption appears to be supported by data from qualitative interviews.

### **Brief Restatement of Findings**

**Sub-research question 1.** The first research sub-question asked if there were any differences in the perceived value of the foreign travel learning experience based on age, race, or gender. There was a positive correlation between age and perceived value, but it was not statically significant. The uppermost age group (60-69) found the learning experience most relevant. However, the youngest age group (20-29) had the highest average overall perceived

value score and the highest average utility score. As with age, there were also five ethnicity groups. The group composed of multi-racial or foreign national students had both the highest average perceived value and cultural intelligence scores. Such a result was not surprising in light of the role of family structure and cultural upbringing in aptitude for global leadership (Stahl & Brennan, 2013). Finally, on the issue of gender, Women had the highest perceived value, but the results were not statistically significant.

After establishing in phase I that participants generally, across demographic differences, hold a view that short-term course-based foreign travel has value, in phase II six themes emerged from two open-ended interview questions to explain the sources and reasons underlying the ratings participants assigned to their experience. The participants' other foreign travel experiences provided a useful point of departure from which to consider their short-term course-based foreign travel. For instance, they were accustomed to having the independence to set their schedules as they saw fit and being able to immerse in another culture while abroad. Although the other travel was not for academic purposes, it seemed to prepare them for their course requirement. The anxiety and excitement participants entered their learning experience with is an aspect not directly related to the course, but nevertheless must be considered.

***Anxiety and excitement.*** When participants were asked about their thoughts and feelings, most of the participants mentioned some degree of anxiety or excitement about foreign travel for school. Participant 007 said he had, "mixed emotions of, excitement and apprehension because I don't know what to expect." In describing his thoughts and feelings, Participant 007 stated he had traveled extensively as a lone traveler but had concerns about being in a big group like the one going to a country he had never visited before. Participant 012 added, "I didn't really know what to expect," which compounded her "anxiety about leaving the country" for the first time.

However, in discussing his excitement for the course-based foreign travel, Participant 016 said, “I was not one hundred percent sure what we were going to be doing from day to day” nevertheless he remained excited to “see a country he had never seen before.” He recalled traveling with his family internationally during his formative years. Participant 022 emphasized that it was her childhood experience of moving to a new country that familiarized her with foreign travel and was “very excited” to participate in foreign travel as part of her doctoral program. Participant 044 added, his excitement came from the “optimism about “being able to try to help them with some of our skill sets and some of the things that our group was subject matter experts and bringing those to the specific charity we were working with.” He also shared that he was looking forward to “exploring the country in a more in a more leisurely sense.” However, Participant 046 discussed feeling anxious from “knowing that I would need to complete an assignment.” But she felt it helped put her “out of [her] comfort zone.” She went on to add that there were “times that were really exhilarating and ‘felt very rewarding in what I was accomplishing.”

***Peer-learning.*** To ascertain the source of the value participants assigned to their foreign travel, the researcher employed qualitative research methods by asking the students to openly describe the most and least valuable portions of the experience. In general, the doctoral students tended to reference or cite how much or how well they learned from their colleagues on the travel delegation as an important feature of their experience. They also were committed more broadly to the idea of collaboration. Participant 011 stated, “the most academically beneficial portion was all the reports that my classmates did on various aspects of China.” Others, like Participant 050, explained that it was “The projects that we did prior to [departing] I think really helped shape and prepare me.” An implication drawn from these findings suggests that short-

term course-based foreign travel incorporate space for participants to teach to and learn from their fellow travelers.

*Cultural exposure.* However, Participant 012 stated “the most beneficial pieces to me were always the cultural components.” She described how “traveling through the towns and through of the different areas of China on the bus, we were really able to see, nuances, like how they buried their people or divided the land.” Participant 007 emphasized that it was most beneficial to get to know the culture and the history of the people and the traditions.” However, he noted that the least beneficial “thing in course-based foreign travel would be that you have only a couple of days in certain places, and it's kind of hard to really get to know the place in a couple of days.

**Sub-research question 2.** The second research sub-question asked if there were any differences in the perceived value of the foreign travel learning experience based on destination. The Cuba destination produced the highest perceived value among individual countries. However, when grouped by geography, the destinations in the eastern hemisphere produced the highest perceived value. But when grouped by political orientation the closed societies had a higher rating. This latter result is not surprising considering that the literature suggests cultural distance is a moderating factor in global leadership development using foreign travel (Dragoni et al., 2014). Nevertheless, the differences were not statistically significant.

After establishing in phase I that participants generally, across destinations, hold a view that short-term course-based foreign travel has value, in phase II six themes emerged from two open-ended interview questions to explain the sources of discontent and parochial reasons underlying the ratings participants assigned to their experience. The destinations were

characterized by differing levels and types of logistical and organizational schedules as well as intergroup contact patterns.

***Logistical scheduling.*** The participants also identified several features in the designs of their experience that were not necessarily beneficial. Although generally positive characteristics emerged, there were four themes identified by most of the participants as detrimental. The four common issues were the rigor or pacing of the itinerary, Participant 012 stated that she was exhausted and everyone from her delegation was fell asleep on the bus, while others, like Participant 016 recalled “hardly even have time to rest” after a long flight before rushing off to their delegation’s first activity. He went on to say it would have been helpful to have time for reflection before rushing off to the next item on the itinerary. In addition to the themes explicitly expressed by the participants, a role in the planning process seemed to be an implied critique of all students, except perhaps for Participant 007 who felt “the program was listening to students.”

***Local contact.*** When asked to describe their interactions with the local populations, the participants described a range of behavior patterns that varied by the destination country. Among the most common features were: frequency, nature, and purpose, of the contact. Depending on the destination, the contact manifested as two polar extremes, which led to scenarios in which Participant 007 could sum up his contact with one word - limited, while Participant 046 explained that her foreign travel for the course had her talking to random strangers in coffee shops and leaving her “so touched by how they wanted to talk with us. And they wanted to share their stories.” Participant 046’s open and friendly contact with the locals was contrasted by Participant 051 and 016 using the word “guarded to describe the nature of their interactions. Like the frequency and nature of the contact, the purpose varied by destination. Thus Participant 044 as able to express his “optimism about being able to try to help them with some of our skill sets



and some of the things [on which] our group was subject matter experts,” while other destinations predominately focused on observing and learning about another culture.

**Sub-research question 3.** The third research sub-question asked if there were any differences in the perceived value of the foreign travel learning experience based on the degree program. The Doctor of Philosophy students had a higher average perceived value score. However, there was not a statistically significant difference between the two groups on the perceived value measure.

After establishing in phase I that participants generally, across degree type, hold a view that short-term course-based foreign travel has value, in phase II six themes emerged from two open-ended interview questions to explain the lessons learned and performance assessments underlying the ratings participants assigned to their experience. The destinations were characterized by differing levels and types of activities and requirements for participants that resulted in divergent take-aways and sources of value.

***Theory-to-practice.*** For the doctoral students in this study, participating in foreign travel was not merely another class assignment; it was an opportunity for real-world application of their program focus. None of the participants had objected to the existence of the requirement, despite critiques of its implementation. Participant 007 commented on his foreign travel experience by saying, “it was putting the dots together between theory and practice that made it special.” While speaking about the intrinsic nature of the discipline, Participant 001 added: “I think that that's what's unique about leadership, the stuff learned in the classroom we could go in use during the program.” Moving beyond the walls of the classroom and into the real world, the participants faced challenges their worldviews and provided with the ability direct their learning, which is

consistent with the principles of learning from experience as part of a complementary component of a structured education program (Kotval et al., 2012).

Additionally, Participant 012 described it as a means for “contextualizing” concepts that were not particularly accessible via the textbooks. Although Participant 017 understood how concepts or content from the program applied to the foreign travel experience, she felt “there was never an opportunity to practice” them. This need for praxis may suggest that the incorporation of more intentional hands-on opportunities is required in particular destinations or for students with more specialized interests.

***Applicability.*** In multiple interviews, participants indicated that they had specific objectives they hoped to achieve through their short-term foreign travel. Some of the goals were professionally oriented; others were more personal in nature. The optimism Participant 044 had about helping a nonprofit organization during his foreign travel ultimately translated into his assessment that he helped “bring a little bit of value” to a foreign nonprofit and developed what he termed “the medium-term picture” for similar endeavors in the future. In a more immediate sense Participant, 046 was able to translate her foreign travel into professional conference presentations and funded-projects. In a more personal sense, participant 023’s reflection of reevaluating policy on education and retirement because of exposure on his foreign travel reflect the myriad ways the experience can be applied. The comments on the applicability of their efforts by the participants suggest there is merit in creating opportunities for students’ pursuit of concrete, tangible goals before during their travel while also remaining open to the unexpected.

**Sub-research question 4.** The fourth research sub-question asked in there was a relationship between perceived value and cultural intelligence. Using a Pearson Correlation there is a significant relationship between perceived value and cultural intelligence. This finding

seems to correspond with the finding that more travel can correlate with high CQ scores (Engle & Nash, 2016).

After establishing, in phase I that there is a positive and statically significant relationship between cultural intelligence and the perceived value of the learning experience, in phase II five themes emerged from two open-ended interview questions to explain the capabilities participants developed in addition to some unexpected discoveries.

***Capabilities development.*** The participants in this study were asked to discuss the capabilities they felt were developed or enhanced because of their participation in the short-term course-based foreign travel and several emerged. Cultural competence, adaptability, and a global mindset were mentioned most frequently. All participants' expressed some level of cultural maturation, whether it was new knowledge or approaches or behaviors. Although he had visited over a dozen countries previously, Participant 016 said of the course-based foreign travel "it helped me to be less ethnocentric." Despite initial reluctance to going on the short-term foreign travel, participant 001 came to the conclusion he could not "keep a sit on the sidelines type of attitude," even though circumstances may not be ideal.

Additionally, when discussing the capabilities developed, two students, in particular, represented the perspective participants held regarding the development of a global mindset through short-term travel. On the one hand, Participant 046 stated the foreign travel was "helping the students from this country going there to develop a global mindset." on the other hand, Participant 022 noted that the experience was not just about helping the developing world. She described her time in "a city as cosmopolitan and modern as anywhere else," as instructive. Ultimately, concluding that countries are catching up or further along than originally thought.

*Unanticipated discoveries.* Participants in this study had an opportunity to discuss matters that were not elicited by the researcher's interview protocol. Two topics addressed by multiple participants were family as a motivating factor and, a critical analysis of the image presented by the destination country. As discussed previously, Participant 050 selected her destination for the foreign travel course based in part on the feasibility of bringing her family along. Participant 001 had to leave a young child at home for foreign travel. He spoke about making the most of the situation by saying, "I was a little reluctant to go on this trip to start. But once I got there and... [engaged with colleagues], I realized you don't keep a sit on the sidelines type of attitude." He added that engaging in the work even though distracted with family concerns. Participant 001 shared a similar commitment to maximizing the value of the travel because his family was not able to travel to his destination. He stated, "I wanted to be sure that I got as much out of it as I could. So I didn't want to waste my time since my family was also sacrificing so much for me to go." The motivating factor was not the only unanticipated discovery. Although participants had a generally positive opinion of their experience, some engaged in critical analysis of the presentation that confronted them.

Participant 011 recalled "riding in the bus pass vacant high-rises and wondering what the future holds for the country" and later "wondering if the government had swept up all the homeless people before [the delegation] arrived at a tourist site." All Participant 016 could think of when reflecting on one of his stops during the foreign travel, was that the city "was just so shiny" compared to what he heard from the tour guide and read in his independent research.

## **Conclusions**

From the review of the literature and data analysis, short-term academic course-based on foreign travel can influence students. As the need for global leaders persists, and higher

education plays a role in their development, investigations in more than one course at one university will be necessary. However, for the participants in this study, the short-term academic course-based foreign travel had more importance (i.e., relevant) than usefulness (i.e., utility).

Regardless of how significant global leadership maybe it is but one perspective on engaging in contemporary society. In fact, social innovation complements rather than contradicts it. Both emphasize the importance of boundary-spanning, albeit across different lines. The infusion of social innovation education into higher education curriculum promotes the development of 21<sup>st</sup> century jobs skills (Rivers et al., 2015). Gamoran (2018) asserts that the future of higher education may hinge on its ability to impact society with more than just its graduates.

The findings in this study suggest that short-term course-based foreign travel can be a vehicle for the initiation or incubation of social innovation. Whether participants are hands-on and actively engaged with developing new ideas that work in meeting social goals (Mulgan et al., 2007) while in a foreign country, or reflecting on new perspectives to old issues at home based on of approaches observed in another culture, the possibilities seem endless. As the participants traveled around the world, they were practicing social innovation education – engaging all three levels of social interactions – civil society, business, and the state (i.e., government) to develop new ideas an approaches, outside of the traditional curriculum, to address social problems (Ellerman, 2012). And all of their recommendations suggest they want more of it.

An exclusive focus on social innovation might address the least beneficial portions while also accentuating the most beneficial portions of the course-based foreign travel identified by the participants in this study. It could simplify the scheduling and itinerary issues, while still

providing and perhaps increasing the theory-to-practice opportunities and connection to the rest of the doctoral curriculum. The short-term course-based foreign travel seems to be preparing future leaders to engage in social innovation on a global stage. If the world is indeed globalized and more interconnected, then notions of what constitutes civil society must expand. The global leadership literature already suggests the business world has adopted this more expansive view. And short-term academic travel may be a way of fostering this perception in students and the social sector.

Moreover, utilization and prioritization of a new set of skills are deemed important for the type of work that will occur during and by crossing boundaries. Finally, they both draw on a similar tradition of learning theories for the teaching and development of those newly required professional skills. However, on social innovation, Mulgan (2012), like researchers on global leadership (e.g., Reiche et al., 2017) highlights the need for further theoretical refinement and foundation building. The intersection of these burgeoning fields creates opportunities for practitioners and a seemingly innumerable set of questions for researchers

An underlying motivation of this study was to advance theory by focusing on foreign travel as a Key Concept. In light of the results in this study, which revealed a relationship between cultural intelligence, and participants' perceived value of foreign travel learning experiences more data and further investigation is warranted to fully evaluate the relationship between foreign travel and the development of global leadership skills, given the global leadership potential predictive ability of cultural intelligence (Rockstuhl et al., 2011). Additional studies, with similar as well as more sophisticated designs, appear warranted to investigate further the extent to which foreign travel adds value to the advancement of both global leadership and social innovation education.

Lastly, the findings of this study suggest that both components of the quantitative phase – the Experiential Learning Survey and Cultural Intelligence Scale are suitable and appropriate for further study with the doctoral student population. However, there are subtle differences in how, now what, themes are expressed. The nuance is a matter of degree not kind. The participants’ description of their experiences suggests that academic course-based foreign travel may be more intricate than a single snapshot analysis can capture. Nevertheless, the value that the participants ascribed to the learning experienced was derived from certain design aspects as well as the various roles the participants were able to play during the academic course-based foreign travel. However, the limited capability development could stem from the brevity of the course-based travel.

### **Implications of Study**

There are a number of practical and theoretical implications to emerge from this study. The intent of this research was to contribute to, and advance, leadership theory, more specifically the burgeoning field of global leadership, and social innovation by clarifying the role of foreign travel as a key concept. Exploring its’ intersection with higher education illuminated opportunities for school leaders, and researchers by beginning to strengthen the link between theory and practice.

**Implications on leadership theory.** The nascent field of global leadership is still early in its development, in need of refinement, theoretical models and a construct definition (Reiche et al., 2017). Early attempts to define global leadership used words “international”, “multinational” and “transnational” interchangeably (Jokinen, 2005). Subsequently, Mendenhall et al. (2012) defined the global component of global leadership as a multidimensional construct involving complexity, flow, and presence. The spatial-temporal dimension may concern the

most obvious issue given the topic. As a dimension of global leadership, presence contains two elements. First, the degree to which an individual must physically move across geographical, cultural, and national boundaries, rather than merely communicate across them with telecommunications. Second, the amount of actual physical relocation a person has to engage in to interact with stakeholders situated around the globe. With the increased attention and efforts in higher education to teach and prepare students for global leadership, the dimension of presence can help distinguish between practices. Innovative approaches like short-term programs are an increasing part of higher education (Montgomery & Arensdorf, 2012; Brown et al., 2012; Rosch & Haber-Curran, 2013). Moreover short-term study abroad, a growing trend in higher education is a means for developing students into globally competent leaders (Montgomery & Arensdorf, 2012). In this study, participants found their short-term study abroad experience to be more important than useful, which suggests that foreign travel may indeed be a key concept in global leadership. However, the less highly-rated usefulness factor may mean that the foreign travel must include certain features.

**Implications on social innovation.** Like global leadership, social innovation prioritizes a new set of skills are deemed important for the type of work that will occur during and by crossing boundaries and has an increasing role in higher education. They both draw on a similar tradition of learning theories for the teaching and development of those newly required professional skills. Mulgan (2012), like researchers on global leadership (Reiche et al., 2017) highlights the need for further theoretical refinement and foundation building. To that end, non-traditional place-based learning is presented as a component of a proposed framework for social innovation education (Rivers et al., 2015). The value ascribed to a short-term learning experience may be evidence of foreign travel as a key concept in social innovation education. Moreover, the



analysis of the destination country performed by the student travelers reflects the critical reflection that Rivers et al. (2015) describe as inherent in their social innovation education framework.

Just as Yee et al. (2019) aimed to reorient discussions on social innovations' impact by focusing on the transformative learning that occurred within participants engaging in social innovation programs, this study sought to examine the value extracted by participants from global learning. Although the underlying perspectives come from Dewey, Knowles and Freire, rather than Mezirow, the principle that assessing the value of social innovation can be the learning it produces is similar. Drawing on Ramirez's (1999) reconceptualization of value, this study attempted to highlight the significance of experiential learning in contributing to social innovation in higher education.

Ultimately, this study strengthens the link between theory and practice for foreign travel in learning experiences. Moreover, it challenges some traditional education paradigms while acknowledging there is yet more to understand because of the limited descriptive nature of this study. However, it provides a sufficient basis for forming a global learning experiences framework. Lastly, the study revealed ripe areas for further study to shape and investigate the elements of that framework.

### **Recommendations to Institutions**

Based on the data gathered in the second phase of this study, the participants recommend the following to promote the success of academic short-term foreign travel:

- Tie to interests, not course: the objection is not to being required to participate in foreign travel, rather the connection of that requirement to a specific course.

- Pre-departure: a structured preparation regime to prepare participants not only for what they will do on the foreign travel, but what they can expect in terms of outcomes from previous delegations.
- Shorter duration but more places: in an effort to create more flexibility and options for participants, the requirement could offer shorter in duration, but closer geographically, to control costs, as opposed to one extended short-term excursion.
- Formal education: although the real-world exposure is a core purpose of foreign travel, planned discussion and reflection time before returning to the home campus may be an effective use of downtime while abroad.
- Small delegations: rather than traveling in large groups with dozens of members small groups will be able to more navigate in the destination while retaining the interpersonal dynamics and peer-learning that occurs in these shared experiences.

### **Recommendations for Future Research**

The results of this study present numerous avenues for potential future research endeavors. The most obvious of which is to reverse the order of the phases and use sequential exploratory mixed methods in which initial qualitative interviews lead to the creation of a quantitative instrument. However, other aspects several questions arose during this study that may lay the foundation for fundamentally different future studies.

One foundational element of this investigation is the setting – a short-term academic course-based foreign travel experience within a single university department. A logical next step may be to involve more departments or institutions in a more extensive study of short-term foreign travel for academic purposes. If, involving multiple institutions proves infeasible, remaining at a single site may still allow for a different population. This study used doctoral

students with an average age of nearly 42. The experiences and concerns they have may impact the value of the short-term experience differently than it would for undergraduates or even master's level students. Although the participants had some influence on their destination, they were all required to take part in the foreign travel experience.

Many of the interviewees recommended the creation of options for satisfying the requirement. The development of such choices would enable a comparison of the perceived value for required versus voluntary academic-course based foreign travel creates another avenue for future research. A more interdisciplinary approach would benefit the results and the implications for the discipline.

Another consideration for future researchers is the use of longitudinal research. Because the participants were in different phases of their doctoral work, they participated in their foreign travel at different times, in some instances as many as five years before or after others in the study. It might provide new insights to examine how perceptions of value change over time.

However, it may be beneficial for future research to use different instruments. Here cultural intelligence was used as a quantitative measure of global leadership, because of its predictive ability in regards to global leadership and the ELS was used to measure perceived value but new instruments may become available in the future.

### **Final Summary**

Since before the Common Era, scholars traveled the globe, or at least as much of it as they knew, in search learning experiences, knowledge, and development. Much has changed over the millennia like wandering scholars on foot being replaced by doctoral students flying to the other side of the world in mere hours. But academic foreign travel continues, and more is

demanded in less time. Few, if any, of the existing frameworks align with the requirements of learning in the 21st century.

As the world continues to become increasingly interconnected, new demands are placed on higher education to prepare graduates to engage in global leadership and social innovation. Having a curricular experience that reflects that need is paramount not just for students but institutions as well. Foreign travel may be a key concept within these broader frameworks, or it may just be an element of the modern academic world. This dissertation offered some clarity on the components that may add value to academic course-based foreign travel to help doctoral students add some expertise in global leadership. But this is only a first step.

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## APPENDIX A

### Site Permission Letter



September 18, 2018

Pepperdine University  
Graduate and Professional Schools Institutional Review Board (GPS IRB)  
6100 Center Drive – 5th Floor  
Los Angeles, CA 90045

RE: Jack McManus  
Charles Gross

Understanding the Perceived Value of Global Learning Experiences for Doctoral Leadership Students

To GPSIRB:

This letter is to convey that I have reviewed the proposed research study being conducted by Jack McManus and Charles Gross intended to [recruit subjects at Pepperdine University GSEP, Leadership Studies Department and find Understanding the Perceived Value of Global Learning Experiences for Doctoral Leadership Students acceptable. I give permission for the above investigators to conduct research at this site. If you have any questions regarding site permission, please contact: 310-568-2308; [june.schmieder@pepperdine.edu](mailto:june.schmieder@pepperdine.edu).

Sincerely,  
  
June Schmieder, Ph.D.

Department Chair, Leadership Studies

Pepperdine University | 6100 Center Drive | Los Angeles, CA 90045  
p. 310-568-5600 | f. 310-568-5735 | [gsep.pepperdine.edu](http://gsep.pepperdine.edu)

## APPENDIX B

### Recruitment Email

Dear Doctoral Colleague,

My name is Charles Gross, and I am a doctoral candidate in the Graduate School of Education and Psychology at Pepperdine University. I am conducting a research study examining the value of foreign travel in global learning experiences and you are invited to participate in the study. If you agree, you are invited to participate in both phases of this mixed methods research – an online survey and an optional follow-up interview.

The survey is anticipated to take about 15 minutes to complete. The optional interview is expected to last about 45 minutes and will be recorded.

Participation in this study is voluntary. Your identity as a participant will remain confidential during and after the study. Survey responses can be submitted anonymously, and interview data will be coded to protect confidentiality. All results will be reported in aggregate – no individual's response(s) will be identifiable.

If you are interested in participating in this study, please click the link below to gain access to the informed consent information and survey:

[https://pepperdinegsep.az1.qualtrics.com/jfe/form/SV\\_cO4u6k0IW2hJdz](https://pepperdinegsep.az1.qualtrics.com/jfe/form/SV_cO4u6k0IW2hJdz)

Respectfully,  
Charles A. Gross  
Doctoral Candidate  
Pepperdine University, GSEP

## APPENDIX C

### Informed Consent

#### **Pepperdine University**

#### **INFORMED CONSENT FOR PARTICIPATION IN RESEARCH ACTIVITIES**

You are invited to participate in a research study conducted by Charles Gross, Ph.D. Doctoral Candidate, and his faculty adviser, Jack McManus, Ph.D. at Pepperdine University because you (a) have completed the international learning experience in the 754B course of the Organizational Leadership or Global Leadership and Change program, and (b) are a currently enrolled doctoral student in GSEP's Leadership Studies Department. Your participation is voluntary.

You should read the information below and ask questions about anything that you do not understand before deciding whether to participate. Please take as much time as you need to read the consent form. You may also decide to discuss participation with your family or friends. You will also have access to a copy of this form for your records.

#### **PURPOSE OF THE STUDY**

The purpose of the study is to examine the perceived value of short-term foreign travel for doctoral students in developing expertise in global leadership.

#### **STUDY PROCEDURES**

If you volunteer to participate in this study, you will be asked to...

1. Sign this informed consent form.
2. Complete a confidential, online survey (expected time commitment: 15 minutes)
3. Potentially participate in a confidential, individual telephone or Voip call interview (expected time commitment: 45 minutes)

If you are willing to participate in the study, you will be randomly assigned a coded, numeric identifier.

This identifier is intended to protect your identity in all parts of the study.

#### **POTENTIAL RISKS AND DISCOMFORTS**

There is no more than minimal risks anticipated for an individual participating in the study beyond those encountered in day-to-day life. However, reflecting on past travel may cause some discomfort for individuals with bad experiences.

#### **POTENTIAL BENEFITS TO PARTICIPANTS AND/OR TO SOCIETY**

While there are no direct benefits to the study participants, there are several potential and anticipated benefits to society. They are anticipated to include a new understanding in the relationship between global leaders learning experiences and the role culture can play in one's development. As this is a research study, the potential and anticipated benefits are contingent upon the findings and recommendations of the study.

## CONFIDENTIALITY

No personally identifiable information collected in this study. Only categorical demographic data will be collected. All results will be presented in aggregate form

The researcher will keep your records for this study confidential as far as permitted by law. However, if the researcher is required to do so by law, the researcher may be required to disclose information collected about you. Examples of the types of issues that would require me to break confidentiality are if you tell the researcher about instances of child abuse and elder abuse.

Pepperdine

University's Human Subjects Protection Program (HSPP) may also access the data collected.

The

HSPP occasionally reviews and monitors research studies to protect the rights and welfare of research subjects.

Following the interview, the numerically coded audio file will be sent to a private, third-party transcription service to be transcribed into a written document. The service provider is contractually operating within the confines of a strict non-disclosure agreement. Additionally, at no point will the service provider have access to any of your personally identifiable information, including, but not limited to, your name. Once the transcription is complete, you will have the opportunity to review the transcript for accuracy and/or any inclusion of personally identifiable information or data you wish removed.

The data collected in this research will be stored in password-protected and encrypted files located on a password protected computer located in the researcher's place of residence. The researcher is the only person with security access to the computer and to the password-protected files. The data will be stored for a minimum of three years. The data collected will be de-identified, transcribed, coded, and analyzed through both quantitative (e.g., multivariate analysis) and qualitative means (e.g., content analysis).

## PARTICIPATION AND WITHDRAWAL

Your participation is voluntary. Your refusal to participate will involve no penalty or loss of benefits to which you are otherwise entitled. You may withdraw your consent at any time and discontinue participation without penalty. You are not waiving any legal claims, rights or remedies because of your participation in this research study.

## ALTERNATIVES TO FULL PARTICIPATION

The alternative to participation in the study is not participating or completing only the items with which you feel comfortable.

## EMERGENCY CARE AND COMPENSATION FOR INJURY

If you are injured as a direct result of research procedures you will receive medical treatment; however, you or your insurance will be responsible for the cost. Pepperdine University does not provide any monetary compensation for injury.

## INVESTIGATOR'S CONTACT INFORMATION

I understand that the investigator is willing to answer any inquiries I may have concerning the research herein described. If I have any other questions or concerns about this research, I understand that I may contact Charles Gross at [charles.gross@pepperdine.edu](mailto:charles.gross@pepperdine.edu) or his faculty supervisor, Jack McManus at [jack.mcmanus@pepperdine.edu](mailto:jack.mcmanus@pepperdine.edu).

#### RIGHTS OF RESEARCH PARTICIPANT – IRB CONTACT INFORMATION

If you have questions, concerns or complaints about your rights as a research participant or research in general please contact Dr. Judy Ho, Chairperson of the Graduate & Professional Schools Institutional Review Board at Pepperdine University 6100 Center Drive Suite 500, Los Angeles, CA 90045, 310-568-5753 or [gpsirb@pepperdine.edu](mailto:gpsirb@pepperdine.edu).

By proceeding, you are acknowledging that you have read the above consent, and agree to participate in the survey.



## APPENDIX D

### Survey Instrument Items

#### 1. INCLUSION/EXCLUSION CRITERIA

- Destination
- Year of travel

#### 2. DEMOGRAPHICS QUESTIONS

- Degree Program
- Gender
- Age Group
- Ethnicity

#### 3. EXPERIENTIAL LEARNING SURVEY (Relevance and Utility subscales)

Listed below are a number of personal statements that may be true for some learners. When thinking about your international travel experience for the 754B course, please select the number that corresponds to how strongly you agree or disagree with the statement provided (1= strongly disagree; 7 = strongly agree).

##### Relevance

- R1: I care about the information I am being taught.  
R2: The learning experience makes sense to me.  
R3: This learning experience has nothing to do with me.  
R4: This learning experience is enjoyable to me.  
R5: I can identify with the learning experience.  
R6: This learning experience is applicable to me and my interests.  
R7: My educator encourages me to share my ideas and past experiences  
R8: This learning experience falls in line with my interests.  
R9: I can think of tangible ways to put this learning experience into future practice.

##### Utility

- U1: This learning experience will help me do my job better  
U2: This learning experience will not be useful to me in the future  
U3: I will continue to use what I am being taught after this learning experience has ended.  
U4: I can see value in this learning experience.  
U5: I believe this learning experience has prepared me for other experiences.  
U6: I doubt I will ever use this learning experience again.  
U7: I can see myself using this learning experience in the future.

#### 4. CULTURAL INTELLIGENCE SCALE (CQS)

Read each statement and select the response that best describes your capabilities.  
Select the answer that BEST describes you AS YOU REALLY ARE (1=strongly disagree; 7=strongly agree)

##### Metacognitive CQ

MC1 I am conscious of the cultural knowledge I use when interacting with people with different cultural backgrounds.

MC2 I adjust my cultural knowledge as I interact with people from a culture that is unfamiliar to me.

MC3 I am conscious of the cultural knowledge I apply to cross-cultural interactions.

MC4 I check the accuracy of my cultural knowledge as I interact with people from different cultures.

##### Cognitive CQ

COG1 I know the legal and economic systems of other cultures.

COG2 I know the rules (e.g., vocabulary, grammar) of other languages.

COG3 I know the cultural values and religious beliefs of other cultures.

COG4 I know the marriage systems of other cultures.

COG5 I know the arts and crafts of other cultures.

COG6 I know the rules for expressing nonverbal behaviors in other cultures.

##### Motivational CQ

MOT1 I enjoy interacting with people from different cultures.

MOT2 I am confident that I can socialize with locals in a culture that is unfamiliar to me.

MOT3 I am sure I can deal with the stresses of adjusting to a culture that is new to me.

MOT4 I enjoy living in cultures that are unfamiliar to me.

MOT5 I am confident that I can get accustomed to the shopping conditions in a different culture.

##### Behavioral CQ

BEH1 I change my verbal behavior (e.g., accent, tone) when a cross-cultural interaction requires it.

BEH2 I use pause and silence differently to suit different cross-cultural situations.

BEH3 I vary the rate of my speaking when a cross-cultural situation requires it.

BEH4 I change my nonverbal behavior when a cross-cultural situation requires it.

BEH5 I alter my facial expressions when a cross-cultural interaction requires it.

© Cultural Intelligence Center 2005. Used by permission of Cultural Intelligence Center. Note. Use of this scale granted to academic researchers for research purposes only. For information on using the scale for purposes other than academic research (e.g., consultants and non-academic organizations), please send an email to [info@culturalq.com](mailto:info@culturalq.com)

## APPENDIX E

### Interview Protocol

#### 1. GLOBAL LEADERSHIP (2)

What, if any, capabilities did you feel were developed during or because of your foreign travel in the 754B course? Why?

How did the lessons learned during your foreign travel compare to what you have learned about leadership in other course settings during your doctoral program?

#### 2. EXPERIENTIAL LEARNING (2)

What aspects of your time abroad for the course did you find most beneficial for your learning and development?

What thoughts and feelings were most prominent during your foreign travel for the 754B course?

#### 3. CULTURE & INTERACTIONS (2)

How would you characterize your interactions with the local population in the foreign destination?

How would you assess your performance during the various activities and site visits during your foreign travel for the 754B course?

4. Please address anything that we have not covered in the questions that you would like to share with me about your experience.

APPENDIX F  
IRB Approval Letter



Pepperdine University  
24255 Pacific Coast Highway  
Malibu, CA 90263  
TEL: 310-506-4000

NOTICE OF APPROVAL FOR HUMAN RESEARCH

Date: November 14, 2018

Protocol Investigator Name: Charles Gross

Protocol #: 18-07-842

Project Title: Understanding the Perceived Value of Global Learning Experiences for Doctoral Leadership Students

School: Graduate School of Education and Psychology

Dear Charles Gross:

Thank you for submitting your application for exempt review to Pepperdine University's Institutional Review Board (IRB). We appreciate the work you have done on your proposal. The IRB has reviewed your submitted IRB application and all ancillary materials. Upon review, the IRB has determined that the above entitled project meets the requirements for exemption under the federal regulations 45 CFR 46.101 that govern the protections of human subjects.

Your research must be conducted according to the proposal that was submitted to the IRB. If changes to the approved protocol occur, a revised protocol must be reviewed and approved by the IRB before implementation. For any proposed changes in your research protocol, please submit an amendment to the IRB. Since your study falls under exemption, there is no requirement for continuing IRB review of your project. Please be aware that changes to your protocol may prevent the research from qualifying for exemption from 45 CFR 46.101 and require submission of a new IRB application or other materials to the IRB.

A goal of the IRB is to prevent negative occurrences during any research study. However, despite the best intent, unforeseen circumstances or events may arise during the research. If an unexpected situation or adverse event happens during your investigation, please notify the IRB as soon as possible. We will ask for a complete written explanation of the event and your written response. Other actions also may be required depending on the nature of the event. Details regarding the timeframe in which adverse events must be reported to the IRB and documenting the adverse event can be found in the *Pepperdine University Protection of Human Participants in Research: Policies and Procedures Manual* at [community.pepperdine.edu/irb](http://community.pepperdine.edu/irb).

Please refer to the protocol number denoted above in all communication or correspondence related to your application and this approval. Should you have additional questions or require clarification of the contents of this letter, please contact the IRB Office. On behalf of the IRB, I wish you success in this scholarly pursuit.

Sincerely,

Judy Ho, Ph.D., IRB Chair

cc: Mrs. Katy Carr, Assistant Provost for Research